

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

I. INTRODUCTION – PORTLAND MAINE RETIREMENT RESIDENCE

Site Description

The subject parcel is located on 18.33 acres located at 802 - 828 Ocean Ave in Portland Maine. The proposed site is irregular in shape with a combined frontage of 452' (+/-)

Abutted by:

- A few single family homes on large lots & undeveloped land along the southerly and easterly portion of the site.
- A 135' wide Central Maine Power Company right of way along the westerly side of the site that abuts Alden's Walk Subdivision
- Ocean Ridge Condominium Development to the north of the site

Current Zoning:

R5-A Residential with a Contract / Conditional Rezone Agreement
C-34 the (Easterly 10.17 acres)

ROS: Recreation and Open Space (Westerly 8.16 Acres)

Current Use: Vacant Wooded Site

Chart/Block/Lot: Tax Map #411, Block A, Lot 7
Tax Map #416, Block A, Lots 6, 7 & 21

Acreage

The parcel is 18.33 acres (798,363 Sq Ft) in size and is currently undeveloped.

Proposed Development

Hawthorn Development LLC proposes a Zoning Map / Text Amendment to allow the use of Congregate Care Facility for this site, with the intent to develop a 150-suite, 4-story, Congregate Care / Independent Senior Housing Facility.

Independent Senior Housing / Congregate Care Facility Concept

The Congregate Care concept is designed for residents with an average age of 82 who are still ambulatory. The facility does not offer medical or nursing care. This development will be privately funded and operated, and will not receive government subsidies.

Each private suite offers the advantages of independent living while the services included provide support, security, and friendship. The private suites include studio, one, and two bedroom versions. Suites do not contain kitchens, therefore they are not dwelling units, and all resident meals are served in a central dining room.

Portland Maine Retirement Residence

Proposed Zoning Map & Text Amendments

Services for residents include three prepared meals daily, housekeeping, laundering service, private van transportation, and various social and physical activities. The Management Team lives on the premises and is available to residents 24 hours a day. The residents monthly rent payment covers the cost of their private suite, all meals, services and utilities, no “buy in fee” is required.

Our typical resident is a single woman in her late 70's or 80's who lives within 10 miles of the site. Approximately 10% of suites will be rented by couples resulting in a total building population of approximately 165.

Fewer than 20% of the residents will be driving their own cars. Because most of our residents prefer not to drive, we provide private van transportation for their use. Van service is included in the monthly rent, available 24/7 and offers residents independence and mobility while providing their families peace of mind.

This type of use does not create the problems typically associated with higher density developments, such as traffic, noise, or increased demand on public services.

Site Design

The Site design and configuration has taken into account the need for efficient land use in order to provide careful conservation of the onsite and nearby natural resources. The location of the building, accessory structures, parking, drive access, and other site improvements have been intentionally located in order to protect environmentally sensitive areas on the site. Additional care and attention has been devoted to providing substantial buffers and the preservation of natural site amenities benefiting both our residents and the surrounding neighbors.

Building Design

The building is designed to be residential in nature. Neighborhood compatibility is achieved in the site planning and building design process. The wing ends and the building center step down from four and three stories to two to one-story sections. This arrangement provides for privacy and a gentle change of scale. Care is taken to minimize the impact to the existing community as well as to complement the surrounding local architecture. Exterior siding materials will include horizontal siding and rock or brick. The roofing material will be architectural composition shingles.

The retirement residence building features common areas for a variety of uses; A central dining room and kitchen for shared meals, multi-purpose room, beauty shop, crafts room, TV room, media/computer room, movie theater, lounges, and an exercise room. The circulation is organized around a central atrium. The common areas are the “social hub” and an essential part of the residents’ lifestyle.

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

Residents will be able to contact the manager with both emergency pull cords and voice communications in each suite.

Proposed vehicle access is provided from a single access point on Ocean Avenue. Since our residents prefer not to drive and van service is available at all times, the traffic impact to Ocean Avenue and the surrounding area will be minimal. Peak-hour traffic impact is very low as our resident's mealtime and activities take place on site during those hours.

II ZONING, LAND USE AND DENSITY

Intent of the proposed Zoning Map Amendment / Text Amendment

The current land use for this site is a combination of R-5A / C-34 for the front (Easterly) 10.17 acres and ROS for the back (Westerly) 8.16 acres.

It is our intent to maintain the existing R-5A / ROS zoning designations and add the use of Congregate Care Facility to the R-5A zoning classification as an allowed use. We propose amending the Ordinance definition for Congregate Care Facility for clarity, and amending the dimensional standards to accommodate this use. Additionally the existing C-34 Contract / Conditional Rezoning Agreement would be rescinded in order to allow the development of our Congregate Care Facility.

III. COMPATIBILITY WITH THE PORTLAND COMPREHENSIVE PLAN

The Portland Retirement Residence is in harmony with the Portland's Comprehensive Plan. Our proposed development addresses the planning goals of the Portland Comprehensive Plan (November 2002, updated 2005) as follows:

Goal "A" – Encourage Orderly Growth

This Development will contribute to the inventory of Senior Housing in the Greater Portland Area. The growing senior demographic both nationally and in Portland and the surrounding area is increasing demand for this and other senior housing options.

The proposed site design carefully considers the most efficient layout, emphasizing minimal impact to environmentally sensitive areas.

Goal "B" – Accommodate Anticipated Growth

Senior Housing, as stated in Goal "A", is a critical segment of future housing inventory options for Portland. Our proposed Congregate Care Facility allows for lower impact on traffic, utilities, schools, and other public infrastructures compared with other possible uses for this site.

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

Goal 'C' – Promote Economic Development

Short Term: The development and construction budget for the proposed Portland Retirement Residence is approximately \$15,000,000. A large amount of these funds will be spent locally- hiring local trades and consultants as well as purchasing building materials and services.

Long Term: Upon completion, the Portland Retirement Residence will provide:

18 - Full time employees

17 - Part time employees

Estimated local contributions annually:

Wages, taxes and benefits costs of approximately \$675,000

Expenditures for energy and utility cost of approximately \$175,000

Local contracts for services and supplies estimated at \$36,000.

Properly Tax contribution \$280,000

Goal "D" –Encourage Decent Housing

The Portland Retirement Residence will meet the "wide variety of new housing" recommendation as called out in Goal "D". It also addresses the policy objective of "insuring a diverse mix of housing types that offers a continuum of options" and the goal to Identify vacant and redevelopment land opportunities throughout the city to facilitate the construction of new housing".

More specifically, this site will address a portion of item viii: "Housing with a range of services and medical support for the elderly and special needs population, including assisted living, congregate care, group homes and nursing homes".

Goal "E" – Protect Water Resources

The design of the onsite stormwater facilities will serve to protect water resource areas from increased or negative impact.

Sanitary Sewer outflow volumes are much less that other possible development on this site, creating less overall impact that other allowed uses.

Goal "F" – Protect Critical Natural Resources

The site design protects the onsite natural resources, by:

- A) Setting aside over 8 acres under a ROS, Residential Open Space zoning designation
- B) Minimizing the building footprint and hard surfaces to avoid wetlands and other sensitive areas
- C) Site design allows for approximately 84% of the site to stand as landscaped and open spaces, providing ample opportunity and protection for flourishing wetlands, wildlife and critical natural resources.

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

Goal “G” – Protect Marine Resources

The location of this site does not create any direct impact on local marine resources. The onsite stormwater facilities will include pretreatment features to outflow lessening any downstream impact.

Goal “H” – Safeguard Agricultural and Forrest Resources

The ROS zoning designation as well as the substantial amount of open and landscape areas of the overall site contributes to further safeguarding the forest resources on the site.

Goal “I” – Protect Historic and Archeological Resources

As a part of the early development process we have contacted the Maine Historical Commission and confirmed that this site does not have any historical or archeological significance.

Note: Near the north central portion of the site a USGS Reference Disk and two additional reference markers are located. These are identified as the “West Graves” USGS marker. The site design will leave this area untouched but accessible.

Goal “J” – Promote Outdoor Recreation

The ROS zoned portion of the site (8.16 acres) establishes over 45% of the Portland Retirement Residence site as undisturbed open space for future recreational opportunities.

Compatibility with the Portland Comprehensive- Summary:

Our Congregate Care Facility will be an important part of future housing in the Greater Portland area. The Portland Retirement Residence uses careful site placement to complement the surrounding community and to co-exist with the natural environment. Additionally, it meets housing needs for local seniors and contributes to the local economy.

IV. DESIGN STANDARDS

Access

The point of access will be from Ocean Avenue near the Northeast corner of the site. (See site plan)

Building Height

Proposed Building Height will not exceed 50 feet as defined in the City of Portland Maine Code of Ordinances, Chapter 14 Land Use

Building, height of: *The vertical measurement from grade, or the predevelopment grade on the islands, to the highest point of the roof beams in flat roofs; to the highest point of the roof beams or the highest*

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

point on the deck of mansard roofs; to a level midway between the level of the eaves and highest point of pitched roofs or hip roofs; or to a level two-thirds of the distance from the level of the eaves to the highest point of gambrel roofs. For this purpose, the level of the eaves shall be taken to mean the highest level where the plane of the roof intersects the plane of the outside wall on a side containing the eaves.

Parking

104 parking spaces proposed:
 87 open spaces
 12 covered spaces
 5 accessible spaces

Parking Ratio: 0.70 spaces per living unit

Hawthorn Retirement Group has developed over 300 retirement residences in North America. Experience from this extensive portfolio has shown that 0.70 parking space per suite ratio is an ideal parking space standard for our residents, staff, and visitors. In part, the reason for this parking ratio is because most of our residents do not drive, (less than 20%) therefore we provide private van transportation for their use. The van is available to take the residents to places they need to visit, such as church, banks, medical offices, shopping areas, etc.

Additionally this parking ratio allows us to increase landscaping and open space areas on the site to create a better residential environment for our residents and adjacent property owners.

Site Parking		
Classification	Current Standard	Proposed Parking
Congregate Care Facility	One (1) parking space for every three (3) living units = 50 Parking Spaces	104 Parking Spaces

Area Regulations		
	Current Standard	Provided
Minimum Lot Size	3 Acres	18.33 acres
Minimum Lot Area Per DU (LU) **	1600 sq ft	2934 sq ft
Minimum Front Setback	35 feet	92 ft.
Minimum Side Setback	16 feet	South 48 ft. North 390 ft.
Minimum Rear Setback	25 feet	344 ft.

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

Maximum Building Height	NA	4 stories / 50 feet
Maximum Bld Coverage	30%	5.5%
Minimum Recreational / Open Space Areas	200 ft per LU	440,053 sq ft

**based on net calculated area of 440,053 sq ft

Dedications

Any additional easements, rights of ways or agreements to accommodate rights of way, utilities, and services to the site will be accommodated as needed.

Fences & Screening

Fences and screening will be provided per the City of Portland Ordinances.

IV. Overview and Summary

Existing Zoning:	R-5A / C-34 & ROS
Proposed Zoning:	R-5A & ROS
Land Area:	18.33 acres (798,363 sq ft) 10.17 acres (442,954 sq ft) - R-5A 8.16 (355,409 sq ft) - ROS
Existing Use:	Undeveloped
Proposed Use:	150-suite Congregate Care Facility
Proposed Parking:	104 total spaces: 87 open spaces 12 covered spaces 5 handicap accessible (Ratio of 0.70 spaces per living unit/suite)

V. PHASING

This 150-suite retirement facility and accessory buildings will be developed in a single phase.

Construction expected in 2016 - 2017

VI. SUPPORTING DOCUMENT AND DRAWINGS

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

Drawings Provided (24' x 36") – 1 copy folded + Digital Disk

- Signed Zoning Map & Text Amendment Application
- Draft R5A Zone Text Amendment (Word Format)
- Portland Application Narrative
- Redacted Purchase and Sale Agreement
- Vesting Deed
- ALTA Survey
- Conceptual Portland Retirement Residence Site Plans for reference
- Conceptual Portland Retirement Residence Exterior Elevations for reference
- Conceptual Portland Retirement Residence Floor Plans for reference

VII. JUSTIFICATION

We respectfully request a Zoning Map Amendment and Text Amendment for the 18.33-acre site located at 802 - 828 Ocean Avenue in Portland Maine. This land use action is sought to allow the development of a 150-suite Congregate Care Facility on the site. This development will provide a positive, quality, low impact addition to the neighborhood and the greater community of Portland.

This site is ideally suited for our senior housing use. It has close proximity to services such as shopping, recreation, and medical services while being near established residential uses. The proposed residence provides an attractive and quiet home that meets the growing demand for senior housing in the Greater Portland Area. This benefits local seniors by providing a quality option to “age in place” within their own community.

Hawthorn Development intends to utilize the Zoning Map Amendment, Text Amendment, and Site Plan Approval Process to acquire the approvals needed to develop a 150-suite Congregate Care Facility for seniors. This process also provides assurance to the City of Portland and the adjacent neighbors as to what will be developed on this site. These approvals will prevent a more intensive use from occurring on the site without input from the community as well as the required reviews and approvals from the City of Portland.

This proposed development is an important component in meeting the current needs and changing demands of seniors in Portland and the surrounding community.

This project offers benefits, which include:

Portland Maine Retirement Residence Proposed Zoning Map & Text Amendments

- Large open spaces and generous setbacks - Over 84% of the site will be landscaped open space, providing a park-like setting and ample buffers to neighboring properties.
- Quiet Senior Residential Use – The proposed retirement residence has 150-suites, which include studios, one bedroom, and two bedroom types.
- Low Traffic Generation – Our project will generate less than 30 peak hour trips per day.
- Increases Local Tax Base – It is estimated that this project will contribute:
\$280,000 annually in taxes
\$650,000 annually in salaries and benefits to local staff
\$180,000 annually in additional local utility and service contracts
This project is privately funded. It will not receive tax credits or government assistance.
- Low Impact on Public Services - Including parks, schools, libraries, utilities, and transportation systems.
- Fulfills Need for Retirement Housing - Our research has found there is a high demand in the area for Hawthorn Retirement's unique program. Recent reports by the HGAC have determined that the demand for senior housing outpaces development in the coming years. This development will complement other senior housing choices available in the area and allows seniors in Portland to remain near neighborhoods they have enjoyed for many years.

VIII. CONCLUSION

In conclusion, this site is ideally suited for this use and the proposed retirement residence would be a positive addition to Portland and the surrounding community.

Thank you for your consideration.