



March 19, 2024

(Via Email PDF)

20.021

Nathan Poore, Town Manager
Town of Falmouth
271 Falmouth Road
Falmouth, Maine 04105

OceanView Retirement Community
Blueberry Lane, Falmouth
Expansion & Modernization Project
Conceptual Masterplan Amendment Proposal
(Map 310 Lots U27-13-E and U27-013-F)

Dear Nathan:

On behalf of OceanView Retirement Community (OceanView) we are pleased to submit this request to the Town Council for consideration of a proposed amendment to the 2015 approved conceptual master plan (Master Plan) for OceanView as required by § 19-21.3 of the Town of Falmouth Zoning Ordinance.

Enclosed are the following materials:

- Cover Letter
- Exhibit 1 – Assessor’s Map & Project Locus
- Exhibit 2 - 2015 Approved OceanView Master Plan
- Exhibit 3 - Proposed 2024 Master Plan Update/Amendment (DRAFT)
- Exhibit 4 – Conceptual Site Plans

1. Background and History:

OceanView at Falmouth, located off Blueberry Lane between Middle and Falmouth Roads, has been one of Maine’s premier retirement communities since it opened in 1986. The community consists of four main components: (1) independent living cottages, (2) independent living/congregate lodge buildings, (3) the Falmouth House assisted living community and (4) the Legacy Memory Care facility. Each component of the campus comes with an increasing array of non-medical support services from home maintenance to dining services to assistance with the activities of daily living like bathing and dressing. By providing a secure, supportive environment with a wide array of services and activities, OceanView helps its residents remain healthy, active and independent.

The 86+/- acre campus has been expanded over the past 37 years as a planned community to meet the needs of residents and market conditions. In 2013, in partnership with the Town of Falmouth, OceanView acquired the former Lunt and Plummer School properties for redevelopment and expansion of the campus and OceanView Retirement Community (OVRC) District. This project resulted in the creation of the Elementary School Redevelopment District (ESRD) to re-develop the former historic school buildings including the Town Mason/Motz Recreation facility. (Refer to *Exhibit 2.*) The most recent project, completed in 2021 includes a new state-of-the-art fitness center and new independent living units as an in-fill project located between Blueberry Commons and Hilltop Lodge (refer to *Exhibit 3 Draft Masterplan Amendment.*)

2. Proposed 2024 Expansion & Modernization Project:

This proposed development will both update and modernize older cottage units and expand the Blueberry Commons apartments to provide additional independent living apartments in a new 4-story building addition. In order for OceanView to remain competitive, older units must regularly be upgraded and modern, energy efficient units created to meet market demand. (Refer to Site Plans, Exhibit 4.)

The project will create a *net* of 29 new units as follows:

Blueberry Commons & Infill Cottages (Lot A/B)

- The addition of 14 new apartment units in a 4th Blueberry Commons building addition – completing the “quad” anchored by the No. 3, 5 and 7 Marion Way buildings.
- Modernization and energy efficiency upgrades in Blueberry Commons building 14 (3 Marion Way).
- The building will occupy existing impervious parking areas as an infill – redevelopment project.
- Provide an underground parking garage for 14 vehicles – reducing the project impervious footprint and creation of additional surface spaces for a total increase of 9 parking spaces.
- OceanView is proposing to work with the Town and also create an additional 10 parallel parking spaces previously designed but not constructed along Blueberry Lane.
- Replacement of cottage unit 50 with a duplex and adding a single unit cottage for a net of 2 additional units.

Cottages 1-10 Replacement and Expansion (Lot C)

- Removal of existing, outdated units 1-10 (constructed in 1984) and replacement with a new neighborhood of 23 new energy efficient independent living units for a net increase of 13 units with the following buildings.
 - One triplex (3-unit) cottage.
 - Two 8-unit, 2 story buildings with under-building garage parking (10 spaces per building or 20 spaces underground parking).
 - One 4-unit, 2 story building with under-building garage parking (5 spaces).
- Addition of 15 surface parking spaces for a total of 43 total parking spaces proposed.
- Utility relocations/expansions and stormwater management.
- The majority of the development footprint occupies the buildings and parking areas of the existing units 1-10 as a re-development project, reducing the expansion of infrastructure into new areas of the campus.

It should be emphasized that this project will reinforce OceanView’s commitment to creating a sustainable community and reduce the use of fossil fuels as the campus is electrified. All buildings will contain generators and rooftop solar as has been the practice for years. Care has been taken in the planning to preserve the wooded buffers maintaining the campus character that has been the trademark of the community.

3. Retirement Community Overlay District (RCOD) and OceanView Retirement Community (OVRC)- Conceptual Masterplan Requirements: (See Exhibits 2 & 3)

The Zoning Ordinance, §19-21 provides requirements for the designation or amendment to a Retirement Community Overlay District as a planned community which includes the approval of a *conceptual master plan*. Specifically, §19-21.3.b specifies the process for designating or amending a RCOD, including the preparation of a conceptual masterplan...*“showing in general terms the proposed location and size of buildings, roads and drives, parking areas, recreational facilities and other development features.”*

Additionally, §19-21-4 states that, *“The Planning Board prior to its approval of a Subdivision or Site Plan shall find that the application is generally consistent with the conceptual master plan if such a plan was approved a part of the designation process.”*

The OceanView Retirement Community (OVRC) is designated as a specific Retirement Community Overlay District in Zoning Ordinance §19-21.9 which references the Council approved OVRC conceptual master plan dated November 09, 2015. That master plan update included the addition of approximately 4 acres of land to the OVRC district along Middle Road which was previously zoned Residential B (RB) and the creation of 14 additional cottage units. Previously, the Council had approved the 2013 conceptual master plan with the addition of the former Lunt and Plummer School properties, noted above, which included major changes to the initial campus and importantly, expanding the OVRC District Boundaries and created the Elementary School Redevelopment District (ESRD). Each of these amendments to the conceptual master plan included significant new development and the expansion of the OVRC District, necessitating an update to the master plan.

The conceptual master plan is meant to provide a blueprint for the overall retirement community - it is not a precise and exacting plan of every element of this 86-acre campus, nor should it be to allow for flexibility. Furthermore, the proposed development does not alter, and indeed reinforces, the walkable, wooded, community feel of the campus which is endeared to the residents.

4. Planning Board & Council Review:

OceanView has submitted a Pre-Application Sketch Plan application to the Planning Department and met with the Planning Board on March 5th. The Board debated whether the proposed Expansion and Modernization project was significant enough to require amending the approved 2015 conceptual masterplan or whether the project was consistent with the master plan. Ultimately no action was taken regarding consistency which would push the project planning schedule back two months for additional consideration by the Planning Board on the consistency finding.

In an effort to move the project forward, the applicant has elected to request that the Council formally approve an amendment to the conceptual masterplan, paving a path forward for the Planning Board to make a finding of consistency with the conceptual masterplan.

5. Conceptual Master Plan Updates/Amendment: (Refer to Exhibit 3.)

The proposed Expansion and Modernization project is shown in red on the attached Draft Proposed Master Plan Amendment - March 2024. A side-by-side comparison of the Council approved 2015 master plan shows clearly that the proposed project is:

- Occupying existing developed areas.
- Is consistent with the intent of the OVRC Zoning which places larger and higher buildings towards the center of the campus and smaller buildings near the perimeter.
- Meets all zoning requirements.
- Maintains and is consistent with the general “character” of the campus.

We are also taking this opportunity to update the master plan to reflect approved units and buildings which have been completed since the 2015 master plan update, revise and refresh the legend and notes referring to “proposed” in 2015 and are now updated to indicated “constructed”. These changes are considered housekeeping items and not substantive.

6. Section 19-21.3.b. Standards:

Zoning Ordinance § 19-21.3.b requires that the Council find that the following standards are met for an amendment of a Retirement Community Overlay District: (Reponses are in italics.)

1. The designation of the Overlay District is consistent with the Town’s Comprehensive Plan.
The proposed project does not require any changes to the designation of the RCOD/OVRC district which was previously approved by the Town Council supporting its consistency with the Comprehensive Plan.
2. The designation will result in the development or expansion of a quality retirement community.
The OceanView Retirement Community and the proposed expansion are the gold standard for full service retirement communities in northern New England. As a family owned operation, investments in the care of residents and quality of place and amenities have strengthened OceanView’s ability to attract residents from around the country.
3. The community is or will be serviced by public sewerage and public water with adequate capacity to serve the development.
The campus is serviced by public sewer (Falmouth Wastewater Department) and public water (Portland Water District). We are working on obtaining serviceability letters for the expansion of 29 units for submission to staff but do not foresee any capacity issues.
4. The community will provide a continuum of care that offers a variety of levels of residential care and arrange of services to elderly and/or disabled residents.
OceanView is a full continuum of care retirement community providing independent/congregate, assisted care and memory care services together with options for varying services including meals, nursing or wellness care. The proposed expansion will offer an expansion of independent/congregate living options.
5. The community will be designed to provide a sense of a unified development with a common design character.
For the last 4 decades, OceanView has continued to expand and develop a unified campus using the same development team of architects, planners, engineers and landscape architects to create neighborhoods as part of a common campus creating a trademark brand for OceanView. The proposed development style, architecture, buffering and scale will be consistent with the current campus design and character.

6. The community will include housing for at least one hundred fifty (150) residents in a range of accommodations.
OceanView has approximately 400 independent residents in a range of accommodations including independent living cottage and Main Lodge, Hilltop Lodge and Blueberry Commons apartments. An additional 77 residents reside at the Falmouth House assisted living facility and Legacy Memory Care facility. Residents have access to amenities from restaurant quality dining, a café, the fitness center, pool facility, dance and theatre facilities, gardens, campus trails and more. The proposed development project will add a net of 29 dwelling units.
7. The designation of the district will not have an unduly negative impact on neighboring properties.
The RCOD/OVRC district has previously been approved by the Town Council. The proposed expansion will not change the district boundary and is being proposed in areas of existing development and impervious areas and will continue to be buffered from neighboring residents.
8. The area to be designated is located in a Residential A (RA) Residential B (RB), or Village Mixed Use (VMU) District.
The RCOD/OVRC overlay district is located in an RB district. The proposed project will not change the boundaries of the RCOD/OVRC district.

In summary, we believe that the OceanView Expansion and Modernization project complies with the OVRC/RCOD Zoning, is consistent with the Comprehensive Plan and maintains the character and quality of the campus while investing in sustainability and energy efficiency upgrades necessary to remain competitive. We respectfully request that the Council approve the proposed master plan amendments.

We look forward to meeting with the Town Council at the next available meeting to discuss the project and master plan in further detail. In the interim should you have any comments or questions please do not hesitate to contact me.

Sincerely,



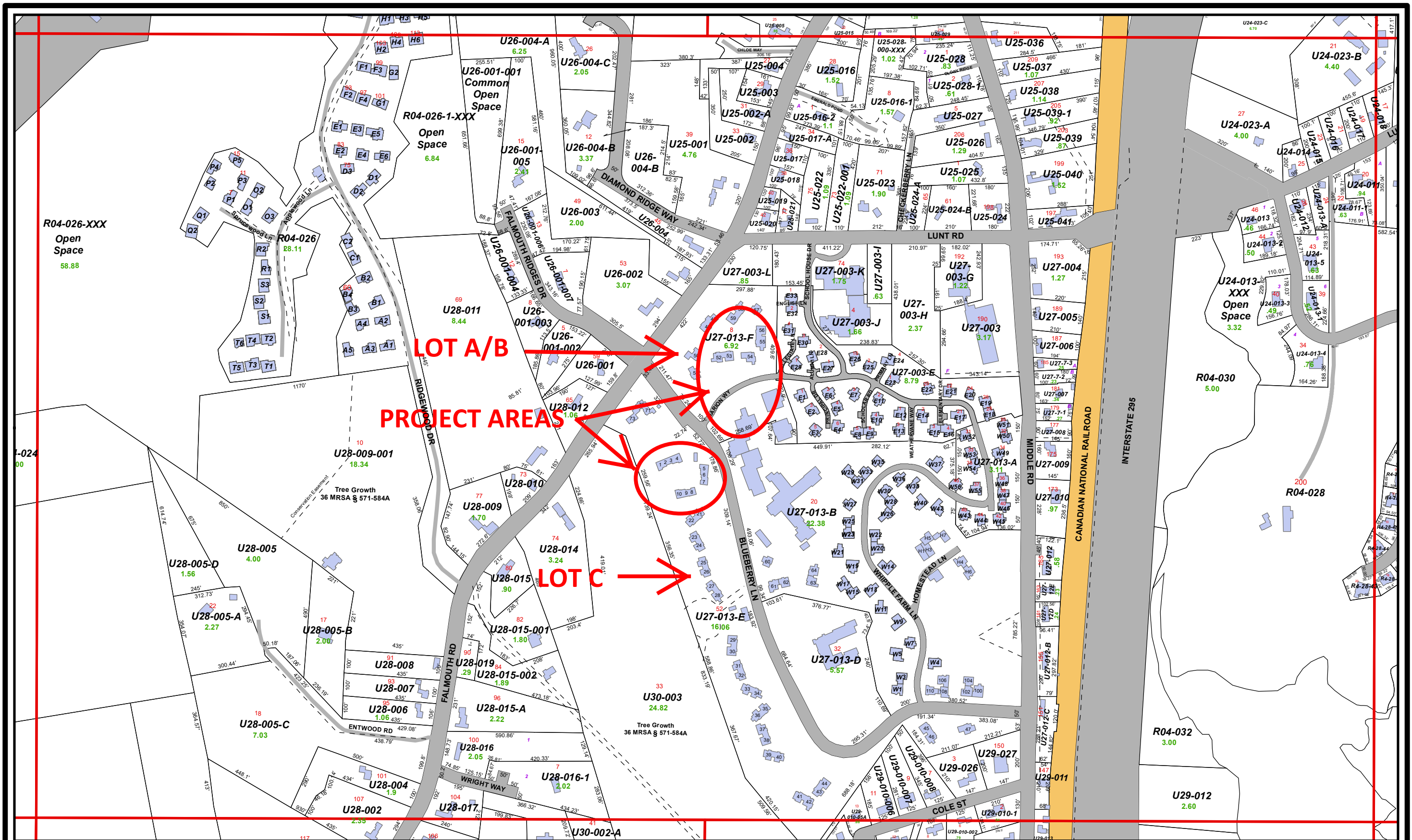
Frederic (Rick) Licht, PE, LSE
Principal

Encl: As Noted

Cc: John Wasileski; OceanView Retirement Community
Chris Wasileski; OceanView Retirement Community
Christian Haynes; OceanView Retirement Community
Charles Katz-Leavy; Jensen-Baird
Mark Bower; Jensen-Baird
Chris Belanger; Belanger Engineering
Rebecca Dillon; Gawron-Turgeon Architects

Exhibit 1

ASSESSORS MAP & PROJECT LOCUS

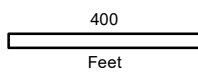


Maps Prepared by: 
 207.846.2355
 www.spatialalternatives.com

Tax Sheets are intended for assessing purposes only.
 Boundary locations are approximate and
 should not be used for conveyance of property.

Legend		MAIN ST	
	Rights of Way/Easements		Parcels
	Buildings:		Roads
	Not Sewered		Railroad
	Sewered		Water
			Road Name
			Map/Lot Number
			Parcel Acreage
			Lot Dimension
			Subdivision Lot Number
			Street Number

Town of Falmouth, Maine



Index Map

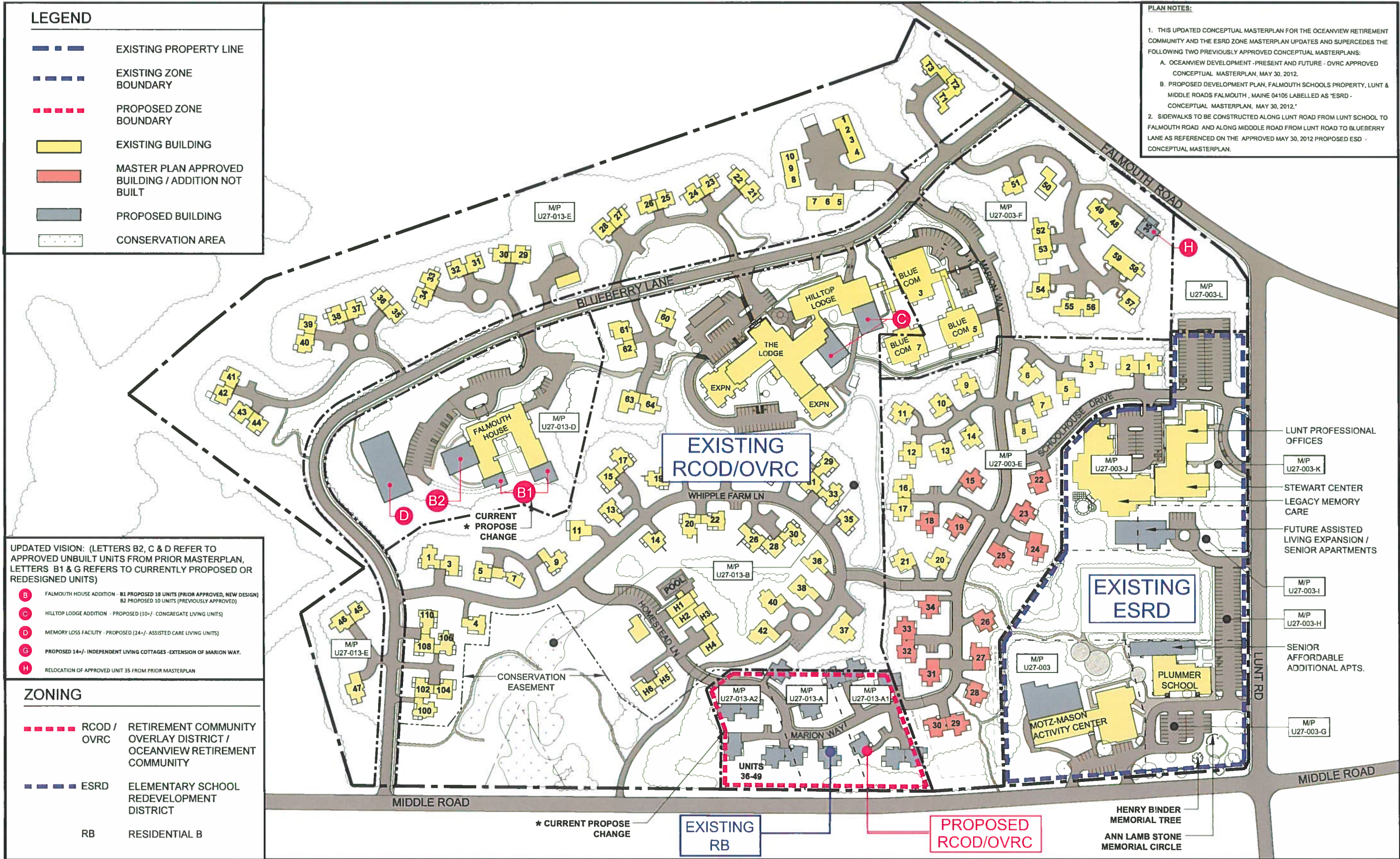
220	231	232	240
	233	234	
300	310	320	
380	390	392	401
		394	403
		404	



Falmouth Tax Sheet
310
 Map updated to: April 1, 2021

Exhibit 2

2015 COUNCIL APPROVED MASTER PLAN



LEGEND

- EXISTING PROPERTY LINE
- EXISTING ZONE BOUNDARY
- PROPOSED ZONE BOUNDARY
- EXISTING BUILDING
- MASTER PLAN APPROVED BUILDING / ADDITION NOT BUILT
- PROPOSED BUILDING
- CONSERVATION AREA

PLAN NOTES:

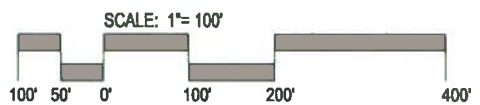
- THIS UPDATED CONCEPTUAL MASTERPLAN FOR THE OCEANVIEW RETIREMENT COMMUNITY AND THE ESRD ZONE MASTERPLAN UPDATES AND SUPERCEDES THE FOLLOWING TWO PREVIOUSLY APPROVED CONCEPTUAL MASTERPLANS:
 - OCEANVIEW DEVELOPMENT - PRESENT AND FUTURE - OVRC APPROVED CONCEPTUAL MASTERPLAN, MAY 30, 2012.
 - PROPOSED DEVELOPMENT PLAN, FALMOUTH SCHOOLS PROPERTY, LUNT & MIDDLE ROADS FALMOUTH, MAINE 04105 LABELLED AS "ESRD - CONCEPTUAL MASTERPLAN, MAY 30, 2012."
- SIDEWALKS TO BE CONSTRUCTED ALONG LUNT ROAD FROM LUNT SCHOOL TO FALMOUTH ROAD AND ALONG MIDDLE ROAD FROM LUNT ROAD TO BLUEBERRY LANE AS REFERENCED ON THE APPROVED MAY 30, 2012 PROPOSED ESD - CONCEPTUAL MASTERPLAN.

UPDATED VISION: (LETTERS B2, C & D REFER TO APPROVED UNBUILT UNITS FROM PRIOR MASTERPLAN, LETTERS B1 & G REFERS TO CURRENTLY PROPOSED OR REDESIGNED UNITS)

- FALMOUTH HOUSE ADDITION - B1 PROPOSED 18 UNITS (PRIOR APPROVED, NEW DESIGN) B2 PROPOSED 10 UNITS (PREVIOUSLY APPROVED)
- HILLTOP LODGE ADDITION - PROPOSED (10+) CONGRGATE LIVING UNITS
- MEMORY LOSS FACILITY - PROPOSED (24+) ASSISTED CARE LIVING UNITS
- PROPOSED 14+/- INDEPENDENT LIVING COTTAGES - EXTENSION OF MARION WAY.
- RELOCATION OF APPROVED UNIT 35 FROM PRIOR MASTERPLAN

ZONING

- RCOD / OVRC RETIREMENT COMMUNITY OVERLAY DISTRICT / OCEANVIEW RETIREMENT COMMUNITY
- ESRD ELEMENTARY SCHOOL REDEVELOPMENT DISTRICT
- RB RESIDENTIAL B



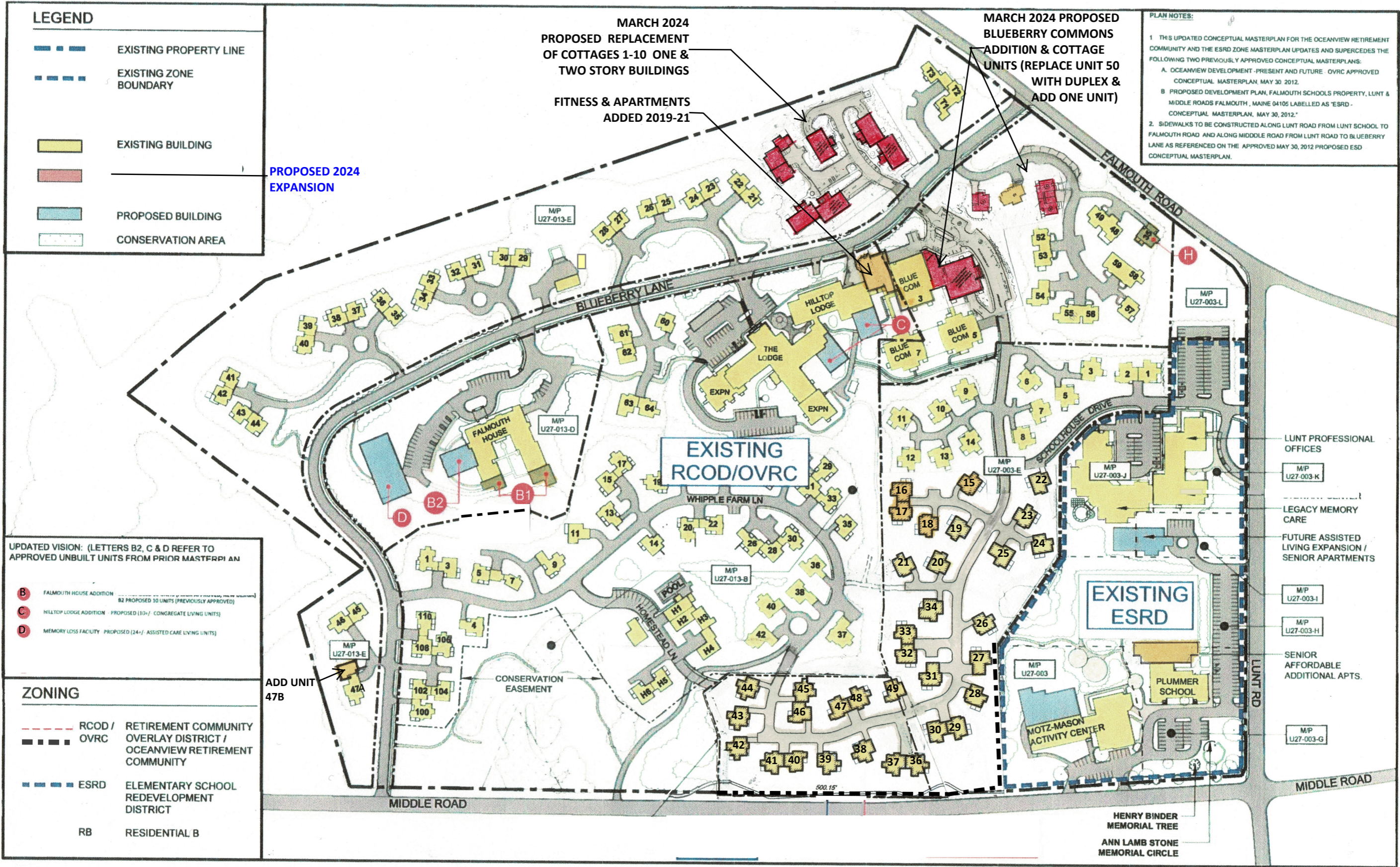
OceanView at Falmouth
 CONCEPTUAL MASTER PLAN
 UPDATED SEPTEMBER 2015

Approved by the Town Council November 9, 2015 Ordinance No 49-2016



Exhibit 3

2024 PROPOSED MASTER PLAN UPDATE/AMENDMENT



LEGEND

- EXISTING PROPERTY LINE
- EXISTING ZONE BOUNDARY
- EXISTING BUILDING
- PROPOSED 2024 EXPANSION
- PROPOSED BUILDING
- CONSERVATION AREA

PLAN NOTES:

- 1 THIS UPDATED CONCEPTUAL MASTERPLAN FOR THE OCEANVIEW RETIREMENT COMMUNITY AND THE ESRD ZONE MASTERPLAN UPDATES AND SUPERCEDES THE FOLLOWING TWO PREVIOUSLY APPROVED CONCEPTUAL MASTERPLANS:
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 - B. PROPOSED DEVELOPMENT PLAN, FALMOUTH SCHOOLS PROPERTY, LUNT & MIDDLE ROADS FALMOUTH, MAINE 04105 LABELLED AS "ESRD" CONCEPTUAL MASTERPLAN, MAY 30, 2012."
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ZONING

- RCOD / RETIREMENT COMMUNITY OVERLAY DISTRICT / OCEANVIEW RETIREMENT COMMUNITY
- ESRD ELEMENTARY SCHOOL REDEVELOPMENT DISTRICT
- RB RESIDENTIAL B

OceanView at Falmouth
CONCEPTUAL MASTER PLAN
 UPDATED SEPTEMBER 2015
PROPOSED AMENDMENT MARCH 2024 - DRAFT

NOTE: THE CONCEPTUAL MASTER PLAN IS MEANT TO PROVIDE A BLUEPRINT FOR THE OVERALL RETIREMENT COMMUNITY - IT IS NOT A PRECISE AND EXACTING PLAN OF EVERY ELEMENT OF THIS 86-ACRE CAMPUS, NOT SHOULD IT BE, TO ALLOW FOR FLEXIBILITY.

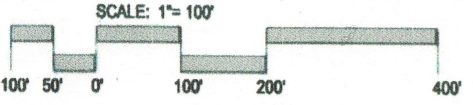
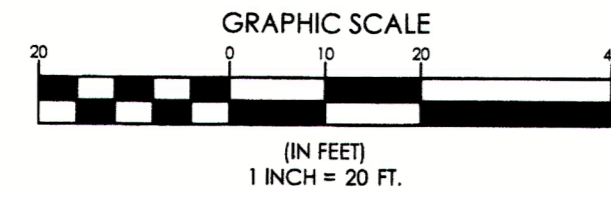
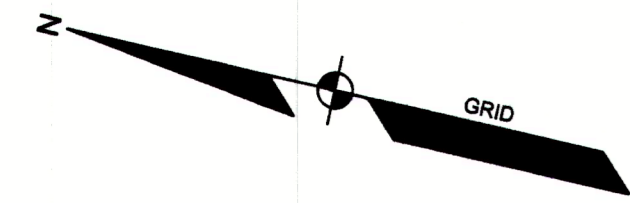


Exhibit 4

CONCEPTUAL SITE PLANS

OCEANVIEW AT FALMOUTH BLUEBERRY COMMONS EXPANSION & MODERNIZATION PROJECT



LICHT
ENVIRONMENTAL DESIGN, LLC

DATE: 02-05-24

CB 1243

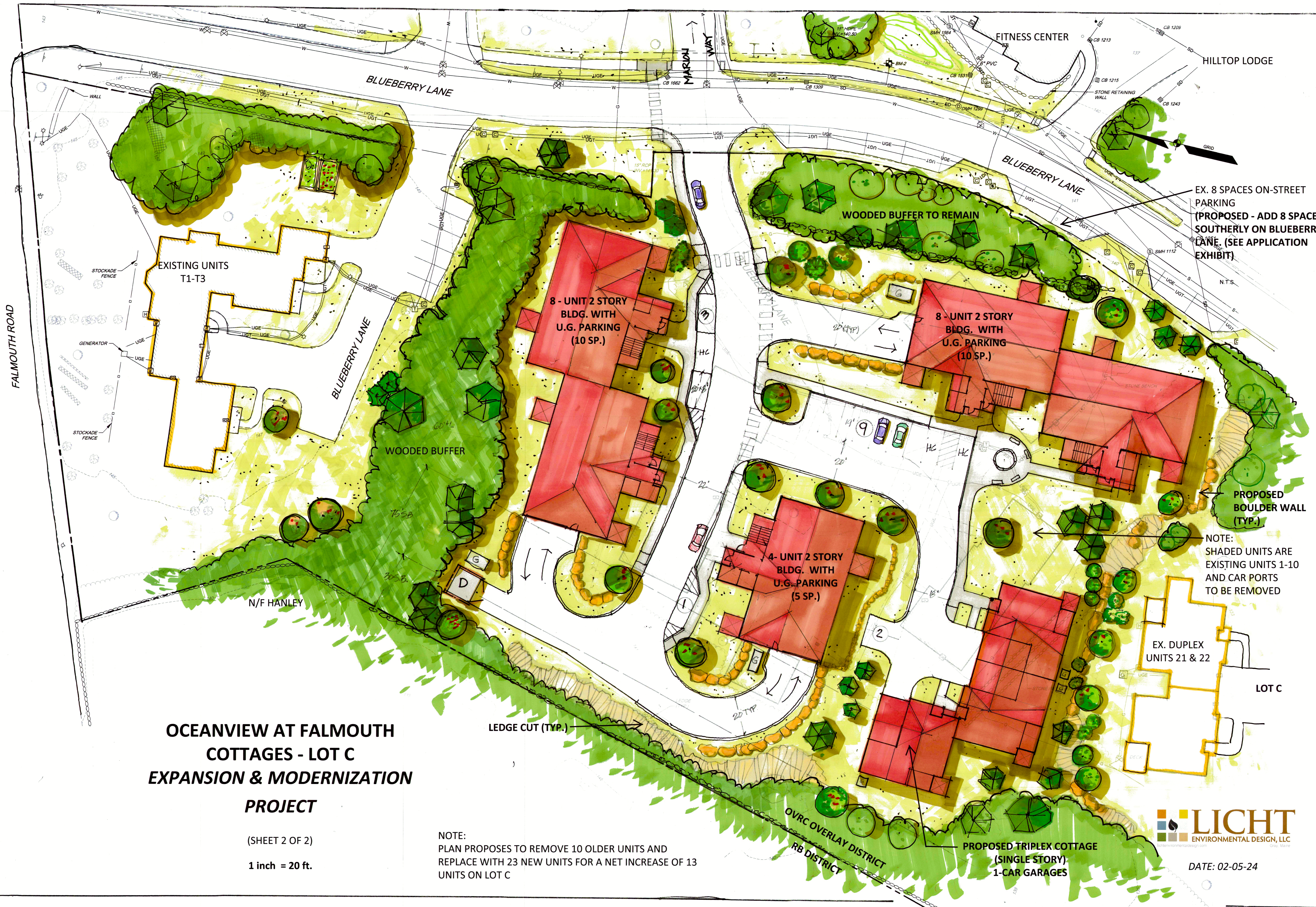
**OCEANVIEW AT FALMOUTH
COTTAGES - LOT C
EXPANSION & MODERNIZATION
PROJECT**

(SHEET 2 OF 2)
1 inch = 20 ft.

NOTE:
PLAN PROPOSES TO REMOVE 10 OLDER UNITS AND
REPLACE WITH 23 NEW UNITS FOR A NET INCREASE OF 13
UNITS ON LOT C



DATE: 02-05-24



EX. 8 SPACES ON-STREET
PARKING
(PROPOSED - ADD 8 SPACES
SOUTHERLY ON BLUEBERRY
LANE. (SEE APPLICATION
EXHIBIT)

PROPOSED
BOULDER WALL
(TYP.)

NOTE:
SHADED UNITS ARE
EXISTING UNITS 1-10
AND CAR PORTS
TO BE REMOVED

EX. DUPLEX
UNITS 21 & 22

LOT C

PROPOSED TRIPLEX COTTAGE
(SINGLE STORY)
1-CAR GARAGES

OVRC OVERLAY DISTRICT
RB DISTRICT

LEDGE CUT (TYP.)

WOODED BUFFER TO REMAIN

WOODED BUFFER

EXISTING UNITS
T1-T3

8 - UNIT 2 STORY
BLDG. WITH
U.G. PARKING
(10 SP.)

8 - UNIT 2 STORY
BLDG. WITH
U.G. PARKING
(10 SP.)

4 - UNIT 2 STORY
BLDG. WITH
U.G. PARKING
(5 SP.)

N/F HANLEY

BLUEBERRY LANE

BLUEBERRY LANE

BLUEBERRY LANE

FALMOUTH ROAD

MARION WAY

FITNESS CENTER

HILLTOP LODGE

GRID

N.T.S.

STOCKADE FENCE

GENERATOR

STOCKADE FENCE

DECK

EDGE

EDGE

EDGE

EDGE

EDGE

EDGE

EDGE

EDGE

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