

**OceanView**  

---

**A T • F A L M O U T H**  

---

*A 21st century retirement community*

September 21, 2015

Falmouth Town Council  
C/o Amanda L. Stearns, AICP  
Community Planning Director  
271 Falmouth Road  
Falmouth, ME 04105

Re: OceanView Retirement Community: Proposed Revisions to Overlay District

Dear Council Members:

On behalf of John B. Wasileski and OceanView Retirement Community, please accept this letter asking you to consider amendments to Falmouth's Retirement Community Overlay District (RCOD) designated as the OceanView Retirement Community Overlay District (OVRC) The overlay district was developed in cooperation with the Town of Falmouth in 1998 and has been an important tool in guiding the positive development of OceanView for the last 17 years. However, after discussions with the planning staff, we feel that this is an appropriate time to update the ordinance to facilitate future growth. The proposed changes include the addition of three properties of approximately 2.95 acres currently zoned Residential B (RB) located at 170-174 Middle Road. The changes are relatively modest yet provide important design flexibility in planning the future of the community. Additionally we are including for approval a revised conceptual footprint for the Falmouth House Assisted Living facility previously approved as Phase B1 on the approved Conceptual Masterplan.

This request has two elements:

1. Proposed RCOD Conceptual Masterplan Update
2. Proposed Amendment to the Town of Falmouth Zoning Map –RCOD Overlay District.

The following letter and attachments are a description of what we are proposing and why.

I. Background

OceanView at Falmouth is one of Maine's premier retirement communities. The community consists of three main components: (1) independent living cottages, (2) independent living lodge buildings, and (3) an assisted living community. Each component of the campus comes with an increasing array of support services from home maintenance to dining services to assistance with the activities of daily living like bathing and dressing. By providing a safe, secure and supportive environment with a wide array of services and activities, OceanView helps its residents remain healthy and independent for as long as possible.

Since 1986, this senior living concept has flourished at OceanView. Falmouth is an ideal home for OceanView and the larger community has embraced OceanView as an important resource for their family and friends. Additionally, OceanView has worked closely with the town over the years to ensure the community grew in a well-planned, responsible manner. This partnership helped

*20 Blueberry Lane  
Falmouth, ME 04105  
(207) 781-4460*

OceanView stay competitive in a demanding marketplace while also remaining a conscientious, courteous neighbor. We look forward to continuing this relationship in the years to come.

## II. The Evolution of OceanView from 1986 to 2015

OceanView has grown in several stages over the last 29 years. The following is a brief description of the stages of growth:

1. Initial Development 1983 to 1986. The initial development included the 50 apartment independent living lodge building (the lodge) and 20 modest cottage homes (1-20) in triplex and quadriplex buildings.
2. Falmouth House & Cottage Expansion 1996 to 2000. The 1990's included 47 additional cottages (21-64, T1-T3) and the addition of the 38 apartment Falmouth House Assisted Living Community. It was during this period that the Town and OceanView recognized the need for a special zoning district for OceanView. The district was adopted in 1998.
3. Renovation & Expansion of the Independent Main Lodge 2003 to 2004. By 2000, the need for a renovated and expanded main lodge complex was clear. This resulted in the construction of the new Hilltop Lodge, a renovation of the Main Lodge and the addition of several new common areas and amenities in 2004.
4. Whipple Farm Cottage Expansion 2005 to 2009. Approached by neighbors interested in selling their land, the community and the overlay district were expanded by the Town Council in 2005. On approximately 15 acres, the Whipple Farm development is a special blend of land conservation, historic preservation and high quality residential development and design (40 cottages & 2 apartments in the barn complex).
5. Redevelopment of the Falmouth Elementary School Property 2012 to present. After the OceanView RFP redevelopment plan was accepted in 2012, OceanView has completed several award winning and innovative projects. These projects include Blueberry Commons (fully occupied luxury apartments, 36 units), Legacy Memory Care (fully occupied Alzheimer's care, 24 units), and Lunt School (fully tenanted, with a public-private Auditorium) and have recently been named one of seven "notable" projects in 2015 by the Maine Real Estate Development Association. Schoolhouse Cottages, a 34 cottage expansion, has over 20 units under construction with 26 of 34 presold, which represent a strong market for continued cottage growth.

Over the last 29 years, numerous competing projects have been built in the greater Portland area. Despite this increasing competition, OceanView maintains its leadership in the industry through a conscious program of maintenance, improvement and expansion. Today, OceanView includes a wide array of senior living choices at a number of different price points. It includes the options and amenities to compete with the newest communities but the charm and character of a mature community. This commitment to maintaining quality and character while seeking continual improvement must continue for OceanView to remain successful.

## III. The Future of OceanView Cottage Projects – Masterplan Updates (Exhibit 2)

1. **Schoolhouse Cottage Addition:** The purpose of this project will be to add fourteen cottages in the same style and floorplans as the current, very successful, Schoolhouse Cottage project. The real estate and senior housing industries are dynamic markets. With the shift from the depression era & World War II generation of seniors to the baby boomers, the changes have become more dramatic and our incoming residents are demanding energy efficient, attractive, state of the art homes with upgraded features.

Some of these features include standard solar electric (PV) packages, radiant floor heating, standard sunrooms additions, and individual home generators. We are requesting the revisions to the overlay district to provide us with the financial ability and design flexibility to meet these challenges. When completed, OceanView will add a total of 49 cottages associated with the Schoolhouse Cottage project.

2. **Falmouth House Assisted Living Addition:** OceanView is in the conceptual planning phases of an expansion to Falmouth House. As this board may recall the approved Masterplan vision included two proposed potential additions to Falmouth House – a memory loss/assisted living expansion of 24+/- units (Masterplan item “D”) and a two phased expansion of the Falmouth House assisted living units (Masterplan items “B1” - 10 units and “B2” - 10 units). The former was actually designed and permitted through the Planning Board and DEP and was tabled when the opportunity for the Legacy Memory Care facility arose with the school redevelopment project. As such any proposed future expansion to the Falmouth House would be smaller than what has been approved on the masterplan.

Current plans would simply re-orient the location the footprint of phase B1 from the southern end of the existing Falmouth House building to a three story extension of the two easterly wings as shown conceptually on the attached Updated Conceptual Masterplan, Exhibit 1. The number of proposed units remains at 10+/- for Phase B1. We would like to take this opportunity to update the Masterplan at this time to reflect the new proposed building addition footprint.

#### IV. Proposed Zoning Map Amendment

The proposed Schoolhouse Cottage expansion encompasses the three lots located at 170, 172 and 174 Middle Road (Assessors Parcels U27-013-A2, U27-013-A and U27-013-A1) totaling 2.95 acres which are zoned Residential B (RB). We are requesting a zoning map amendment to add these three lots to the 60.13 acre RCOD/OVRC Overlay District creating a new total district area of 63 acres+/- . The proposed area of map amendment is shown on Exhibits 2 and 3. The neighboring properties on the south side of Middle Road are zoned RA while the remaining properties abutting and neighboring the OceanView campus are zoned RB.

The zoning change is required to integrate the 3 properties into the neighborhood style design which has flourished at OceanView which would not be allowable under the current RB zone. We feel that the proposed campus expansion will also compliment the residential homes on Middle Road. The project will increase the value of OceanView and the tax revenues to the community while building upon the quality neighborhoods and community centered design which has made OceanView successful for over 25 years.

#### V. Summary

The Schoolhouse Cottage proposed revisions have received an introductory site walk tour and preliminary review by Town Planning Staff prior to submission to the Falmouth Town Council. We look forward to further review of this plan with the Falmouth Planning Department staff and to continued input from the Council in order to finalize the next steps of this proposed development.

This submission includes the following documentation and plans.

VI. Exhibits & Plans

1. Conceptual Masterplan Update
2. Falmouth Zoning Map Amendment
3. Proposed RCOD Zoning Map Amendment
4. NRA Density calculation tables for reference

On behalf of John B. Wasileski and the OceanView Community, we thank you for the opportunity to present and to discuss this proposal with the Council.

Very truly yours,

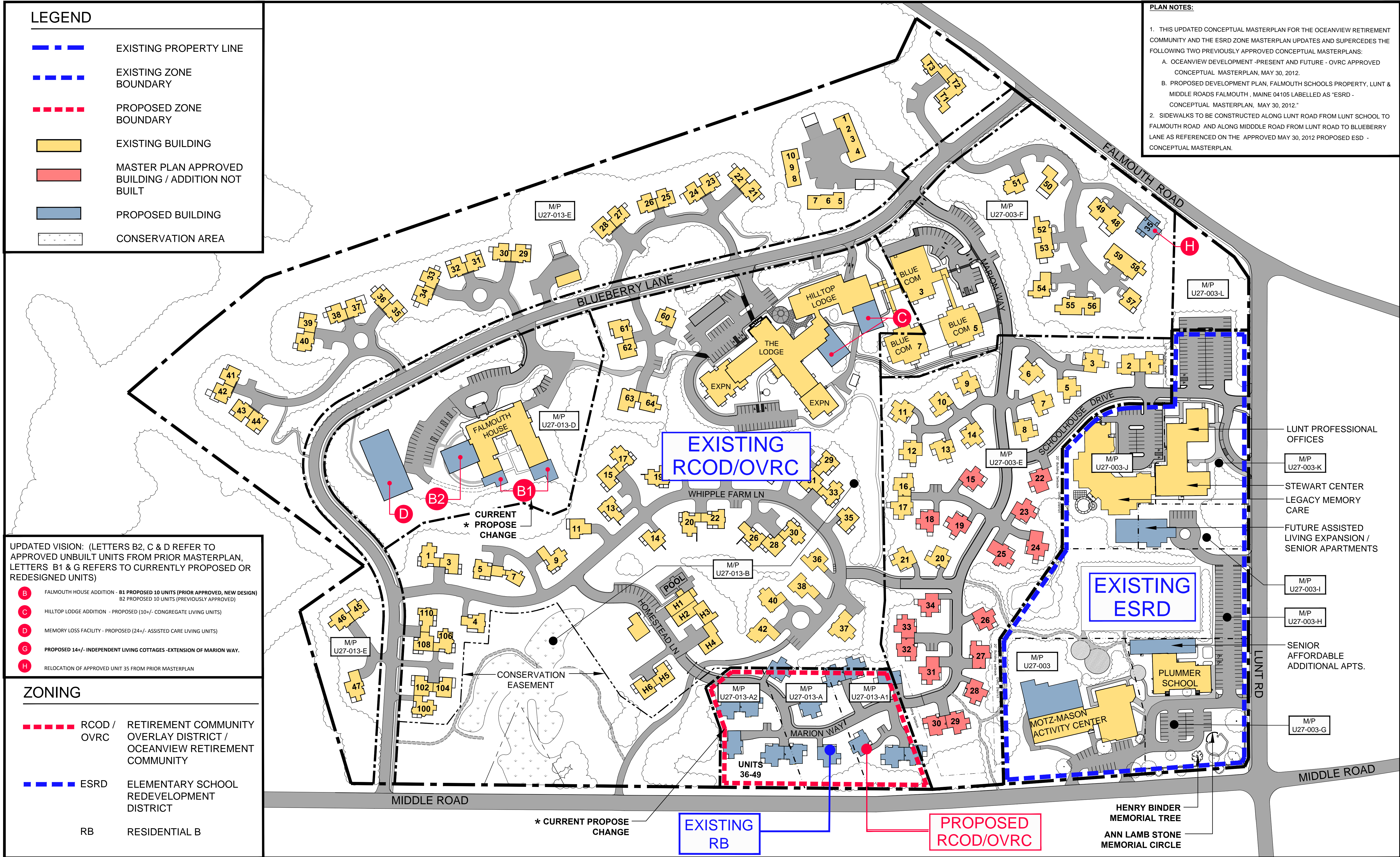


For:  
Christopher L. Wasileski, Development Project Manager  
OceanView Retirement Community

Enclosures

Cc: John B. Wasileski, Owner/Developer, OceanView Retirement Community  
Matthew D. Teare, Director of Development, Sea Coast Management Co.  
Ronald Epstein, Esq.  
Frederic Licht, PE, LSE  
Chris Belanger, Belanger Engineering





**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:**

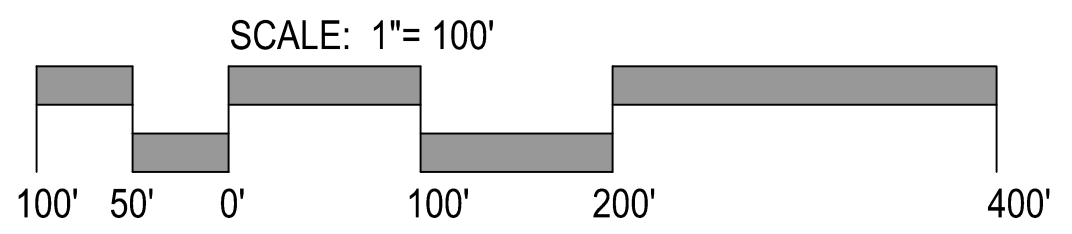
- THIS UPDATED CONCEPTUAL MASTERPLAN FOR THE OCEANVIEW RETIREMENT COMMUNITY AND THE ESRD ZONE MASTERPLAN UPDATES AND SUPERCEDES THE FOLLOWING TWO PREVIOUSLY APPROVED CONCEPTUAL MASTERPLANS:
  - OCEANVIEW DEVELOPMENT -PRESENT AND FUTURE - OVRC APPROVED CONCEPTUAL MASTERPLAN, MAY 30, 2012.
  - PROPOSED 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 ESRD - 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 10 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

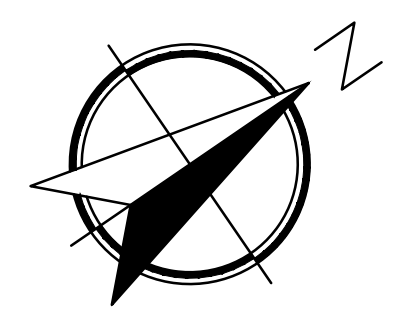
**ZONING**

<span style="color: red;">---</span>	RCOD / OVRC	RETIREMENT COMMUNITY OVERLAY DISTRICT / OCEANVIEW RETIREMENT COMMUNITY
<span style="color: blue;">---</span>	ESRD	ELEMENTARY SCHOOL REDEVELOPMENT DISTRICT
<span style="color: blue;">---</span>	RB	RESIDENTIAL B

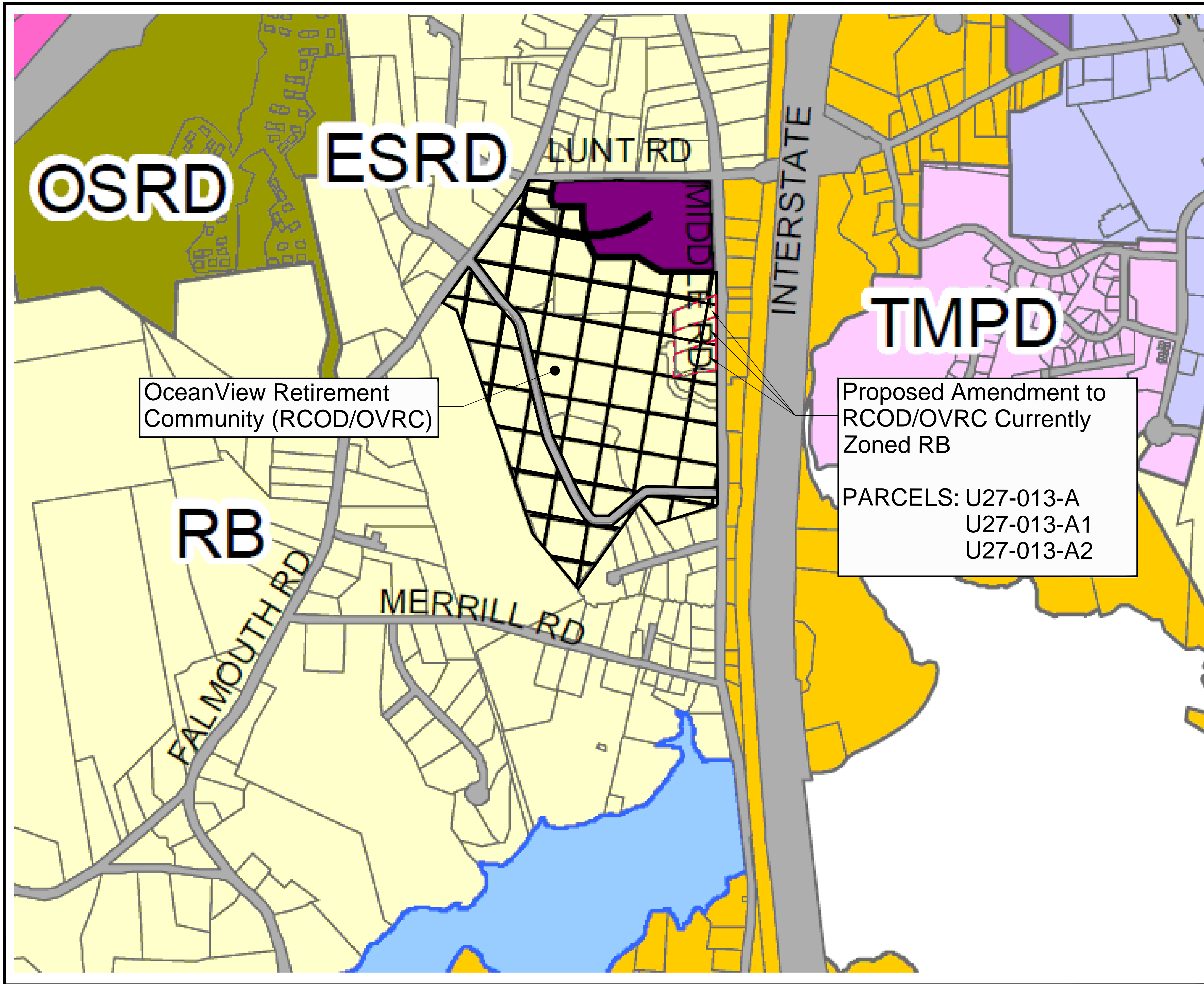


**EXHIBIT 1**

**OceanView at Falmouth**  
**CONCEPTUAL MASTER PLAN**  
 UPDATED SEPTEMBER 2015







**Zoning Districts**

- RA Residential A 20,000 sq.ft.  
Minimum Lot Width 125 ft.
- RAm Residential A  
Manufactured Housing Subdistrict
- RB Residential B 40,000 sq.ft.  
Minimum Lot Width 150 ft.
- RBm Residential B  
Manufactured Housing Subdistrict
- RC Residential C 60,000 sq.ft.  
Minimum Lot Width 160 ft.
- TMPDD Tidewater Master Planned Development District

NOTE: Also see Town of Falmouth's Zoning and Site Plan Review Ordinance for spatial requirements and performance standards.

- F Farm and Forest 80,000 sq.ft.  
Minimum Lot Width 250 ft.
- Fm Farm and Forest  
Manufactured Housing District
- SB1 Suburban Business 1  
Minimum Street Frontage 200 ft.
- MUC Mixed Use Cluster
- VMU Village Mixed Use
- MRSD Middle Road Special District
- ESRD Elementary School Redvelopment District
- BP Business Professional
- OSRD Open Space Residential District
- WFCMPD West Falmouth Crossing Master Planned Dev
- VCC Village Center Civic
- VC1 Village Center 1
- VC2 Village Center 2

**Overlay Districts**

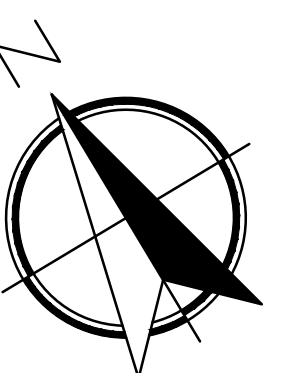
- Corridor Overlay  
1,000 ft. from center of Route 100  
in either direction.
- Highland Lake Overlay District
- Ocean View Retirement Community
- Water View Overlay District
- SZ See the official Falmouth Shoreland Zoning Map for Shoreland Zoning District delineation.

**EXHIBIT 2**

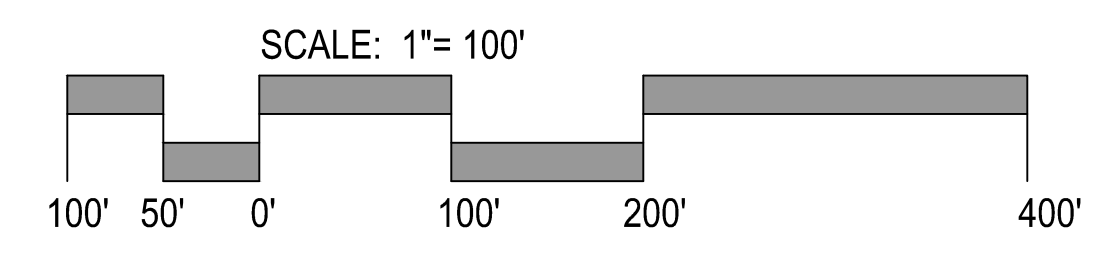
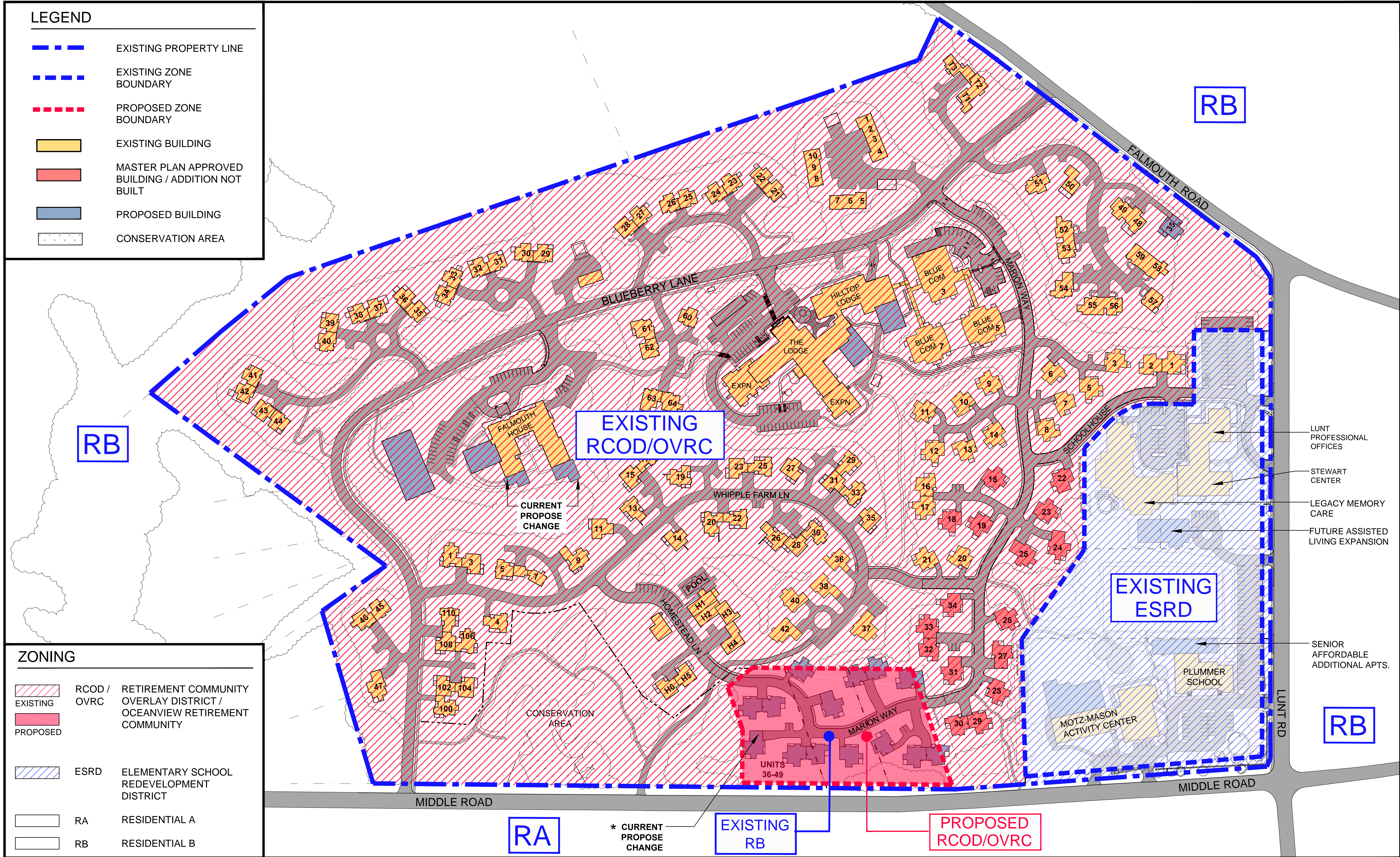
REFERENCE: FALMOUTH ZONING MAP REV. 2013  
SCALE: N.T.S.

**OceanView at Falmouth  
FALMOUTH ZONING MAP AMENDMENT**

SEPTEMBER 2015

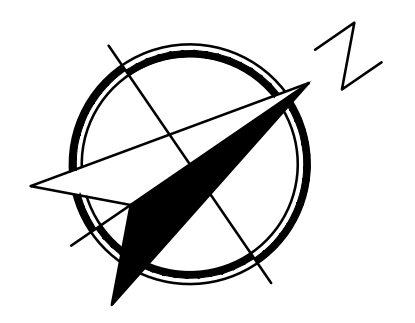






**EXHIBIT 3**

**OceanView at Falmouth**  
 Proposed RCOD Zoning Map Amendment  
 September 2015





**OceanView Masterplan - NRA Calculations RCOD/OVRD acquisition of 170-174  
Middle Road Lots**

Rev: 08-26-15

Reference: Falmouth Zoning Ordinance Section 5.31 -Net Residential Density Calculations (New 2014 Ordinance Chapter II - 19.64.1)		acres
<b>Total New Acquired Lots (U27 - 12, 13A1 and 13A2) (170-174 Middle Rd.)</b> (Ref. April 2015 Survey Itcomb Assoc scaled area by LED.)		<b>2.95</b>
<b>Section 5.31 Deduct Reference</b>	<b>Description</b>	<b>Deduct Area (ac.)</b>
(a)	10% for Roads and Parking	0.30
(b)	Isolated Land	0
(c)	Flood Plain	0
(d)	Unsuitable Land >25% Slopes (approximate, scaled)	0.15
	Wetlands	0
	Coastal Wetlands	0
(e)	Rights of Ways or Easments	0
(f)	RP District Land	0
	Total Deducts	<b>0.45</b>
<b>Net Residential Area = Gross Acres - Deducts (Acres) :</b>		<b>2.51</b>
<b>Allowed Density( UNITS) (FZO Section 3.16.6 old Ordinance -1 unit/6000 sf NRA)</b> (Old FZO Section 3.16.6 old Ordinance -1 unit/6000 sf NRA) (New Ordinance Chapter II Section 19-21 no change in requirement)		<b>18</b>
<b>Proposed Units per 2015 Master Development Plan</b>		<b>14</b>

EXHIBIT 4



**OCEANVIEW CAMPUS AND SCHOOL REDEVELOPMENT PROJECT**

**TOTAL EXISTING AND PROPOSED UNIT/BED COUNT**

Revised 08-25-15 add Middle Rd Lots

LOT	USE	UNIT/BED COUNT
<b>EXISTING</b>		
A/B	MAIN LODGE APTS.	83
A/B	COTTAGES 11-20	10
A/B	COTTAGES 48-64	17
A/B	WHIPPLE COTTAGES 100-133,135,137	36
A/B	WHIPPLE COTTAGES H1-H6	6
C	COTTAGES 1-10, 21-47, 71-73	40
D	FALMOUTH HOUSE ASSIST. LIVING	37
D	FALMOUTH HOUSE MEMORY LOSS (1)	26
	<b>TOTAL BEDS/UNITS EXISTING</b>	<b>255</b>
<b>PROPOSED</b>		
<i>A/B</i>	<i>BLUEBERRY COMMONS APTS.</i>	<i>36</i>
<i>A/B</i>	<i>REMOVE COTTAGES 11-20</i>	<i>-10</i>
<i>A/B</i>	<i>NEW COTTAGE</i>	<i>1</i>
<i>E</i>	<i>COTTAGES 1-34</i>	<i>34</i>
<i>I</i>	<i>FUTURE SENIOR APARTMENTS</i>	<i>20</i>
<i>J</i>	<i>LUNT MEMORY CARE CENTER</i>	<i>24</i>
<i>K</i>	<i>LUNT OFFICES/ADULT DAY CARE/AUDITORIUM</i>	<i>0</i>
	<b>TOTAL BEDS/UNITS PROPOSED</b>	<b>105</b>
	<b>2015 170-174 MIDDLE ROAD LOTS</b>	<b>14</b>
	<b>TOTAL EXISTING AND PROPOSED UNITS/BEDS</b>	<b>374</b>
<i>F/G/H</i>	<i>MOTZ/PLUMMER/VILLAGE GREEN (2)</i>	N/A
NOTES:	1. FALMOUTH HOUSE 26 ML BEDS APPROVED 2011 NOT CONSTRUCTED.	
	2. LOTS F/G/H USES TO BE DETERMINED AS PUBLIC PRIVATE PARTNERSHIP	

<b>OceanView at Falmouth</b>														
<b>Town of Falmouth Retirement Community Overlay District</b>														
<b>Summary Computation of Net Developable Area and Density</b>														
<i>Last Rev. Sept 18, 2015,</i>														
<b>PROPOSED MIDDLE ROAD LOTS AMENDMENT</b>														
<b>OceanView Combined RCOD/OVRC and Middle Road Amendment (Total Units/Beds Allowed vs. Actual)</b>														
<i>(see attached masterplan update Sept. 2015 or lot areas and proposed uses)</i>														
<i>Town Lot Parcel per Masterplan Concept</i>			<i>Net Residential Area</i>				<i>Dwelling Units/Bed Allowable Density</i>							
<i>Development</i>	<i>Lot</i>	<i>Property</i>	<i>Total</i>	<i>Combined Deducts</i>	<i>Net</i>	<i>NRA</i>	<i>Total</i>	<i>Total</i>	<i>Proposed</i>		<i>Total</i>	<i>Avail.</i>		
<i>Area</i>	<i>ID</i>	<i>Use</i>	<i>Area</i>	<i>Area</i>	<i>Area</i>	<i>Per Unit</i>	<i>Allowed</i>	<i>Existing</i>	<i>OV</i>	<i>Town Lots</i>	<i>Existing and</i>	<i>Density</i>		<i>Comments</i>
			<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Sq. Ft.</i>					<i>Proposed</i>			
<b>Cottages/ Lodges IL</b>	Lot A Town and Lot A/B and C at OV (OV Assessors Map U27 Parcels B,E,F) (includes Whipple Farm)	Cottages and IL Apartments	55.14	10.96	44.18	6,000	<b>321</b>	197	34	35	<b>266</b>	55	(units)	Units =34 are constructed. Proposed Cottages = 35 are 34 Lot E School
<b>Falmouth House Assist.Living</b>	Lot D (Town Assessors Map U27-01-3D)	Assist Living Beds	5.00	1.01	3.99	2,000	<b>87</b>	38	46	0	<b>84</b>	3	(Beds)	
<b>Proposed Middle Road Lots Addition</b>	Proposed Amendment to RCOD - 170. 172 and 174 Middle Road (Assessors Map U27 Parcels 13, 13A1 and 13A2) totalling 2.95 acres	Cottages	2.95	0.45	2.51	6,000	<b>18</b>	0	14	0	<b>14</b>	4	(units)	(Proposed addition of Middle Road lots =development masterpoan concept proposes 14 units)
Total Acreage			<b>63.09</b>		50.68		<b>426</b>	235	94	35	<b>364</b>	62		

# EXHIBIT 4