

Town of Falmouth



Route 1 North Vision Plan

June 2017



Acknowledgements

The Route 1 North Committee would like to thank the Town of Falmouth residents and business owners, Town staff, consultants, and general public who provided knowledge, assistance and insight throughout the process of developing this Vision Plan.

Route 1 North Committee

Chris Wasileski - Chair
Nicole Favreau - Vice Chair
Arthur Batson
Paul Burlin
Dava Davin
Laurie Leonard
Jay Trickett
Steve Woods
Charlie McBrady - Council Liaison

Town of Falmouth

Nathan Poore - Town Manager
Theo Holtwijk - Director of Long-Range Planning

Project Team

VHB

Geoffrey Morrison-Logan – Principal-in-Charge
David Woodward – Project Manager
Steve Thomas – Senior Advisor
Renee Guo - Planner

RKG Associates, Inc.

Craig Seymour – Market/Economics

Table of Contents

Introduction	1
Purpose	1
Process	2
Study Area Analysis	3
Existing Conditions	3
Current Real Estate Market	19
Stakeholder/Public Input	19
Issues and Opportunities	20
Route 1 North Vision	27
Goals	27
Vision	29
Recommendations	40
Cost Estimate	44
Next Steps	45

**Appendix A – Zoning Excerpt of Residential A District
and Business Professional District**

**Appendix B – RKG Route 1 North Vision Plan
Market Indicators Memorandum**

Introduction



The northern section of Route 1 is part of one of Falmouth's Commercial/Mixed-Use Growth Areas. With this designation comes the opportunity to foster growth and economic development in this area. To achieve this promise, the Town initiated a planning process that was intended to establish a clear vision and implementation action items for the future of Route 1 North. The Town engaged the planning services of VHB, Inc. to assist the Route 1 North Committee and the Town in the preparation of a Vision Plan along Route 1 North. This Corridor Study focuses on the section of land extending from the Falmouth Turnpike Spur overpass to the Falmouth – Cumberland Town Line and the relationship of land use, transportation, infrastructure and aesthetics.

Purpose

The purpose of the Route 1 North Vision Plan is to provide a framework to make informed decisions, manage growth in an

orderly fashion and guide development/redevelopment of the physical environment. The plan is intended to provide the Town of Falmouth with a corridor vision plan for Route 1 North. In addition, this plan offers a vision for the study area's future development patterns and streetscape opportunities to enhance the corridor's aesthetics and create an overall identity.

The Route 1 North Vision Plan is designed to complement the goals of the Town of Falmouth's planning and community efforts by providing a vision and direction for future development. This is a guiding document and is meant to assist the Town of Falmouth in prioritizing implementation items and future Town projects.

The plan considers influences within the study area as well as surrounding factors. Implementation of this plan is targeted over the next 5 – 20 years and will help the Town of Falmouth to

Introduction

continue to provide services in a planned and organized fashion and help to make the community's vision a reality.

Process

The Route 1 Vision Plan planning process was kicked-off in November 2016, and spanned a seven-month period that was conducted in four phases: Data Collection, Stakeholder Involvement, Conceptual Analysis and Recommendation phases. The process included Town officials, the Route 1 North Committee, stakeholders and local business owners & employees. VHB assessed the impacts of existing developments on land uses and infrastructure, while considering the area's future needs and identity within the Town.

In a separate, but concurrent, PACTS-funded study, T.Y.Lin International examined Complete Street improvement opportunities along Route 1 in Falmouth, Cumberland, and Yarmouth. That work also included Route 1 North.

Data Collection Phase

During the Data Collection Phase, goals were established, schedules were outlined, data collected, and opportunities and constraints identification began. This phase established an understanding of the study area. The Route 1 North project was kicked-off with an introduction of the primary team members to Town leadership and Route 1 North Committee members and expectations were defined. The planning team compiled data through interviews, ordinances, plans, town maps, and conducted site visits to organize essential baseline information.

Stakeholder Involvement Phase

The planning process engaged the community to build consensus for the Route 1 North Vision Plan. Stakeholder

meetings were held to identify issues and seek public information on desires for improvements. Public meetings were also held to present ideas and gather feedback.

Conceptual Alternatives

During the Conceptual Alternative Phase, the planning team gave thorough consideration to observations, existing conditions and data gathered during the previous phases. Issues were categorized and potential recommendations were explored. The preliminary recommendations were then presented to the Town for review. The team received feedback regarding critical issues and further refined the preliminary recommendations based on comments.

Final Plan

The information developed and refined during the conceptual alternative phase was then advanced into strategies. A clear vision with recommendations was developed and implementation tools were outlined. The final Route 1 North Vision Plan will be presented to the Town Council.

Study Area Analysis

2

The Route 1 North Vision Plan study area is located along Route 1 from the Falmouth Turnpike Spur overpass north to the Falmouth-Cumberland Town Line. (See **Figure 1** "Study Area") The area is 1.3 miles in length, consists of approximately 323 acres and has approximately 63 property owners. The study area boundary should not be viewed as a fixed boundary. The study area consists primarily of the Route 1 right of way and the adjacent properties. The study boundary is not intended to set limitations on vision, investment, financial resources, planning efforts or future development within the larger context of the Town of Falmouth.

Existing Conditions

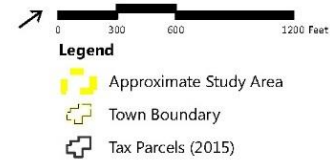
Zoning

The study area currently consists of two zoning categories. The predominant zoning category is Business Professional District

(BP) and the secondary zoning category is Residential A District (RA). See **Figure 2** "Zoning". The total area within the study area that is zoned BP is 254 acres or 78% of the study area. The total area within the study area that is zoned RA is 69 acres or 21% of the study area.

BP zoning category was established by the Town of Falmouth to permit the development of business and professional offices and some conditional uses such as light manufacturing facilities, laboratories, churches. Residential uses and retail uses are not currently permitted in the BP zone.

RA zoning category was established by the Town of Falmouth to permit the development of primarily single family, duplex and multi-family residential and some conditional uses such as day care centers, churches, health institutions, and private schools.



Route 1 North Concept Plan

Town of Falmouth, Maine

Study Area

Source: Town of Falmouth, MEGIS, VHB

Study Area Analysis

See excerpts from the Town Code of Ordinances for a more detailed listing of permitted and conditional uses allowed in the RA and BP zoning districts in **Appendix A**.

In 1998 the Town of Falmouth developed a Design Guidelines Route One document that addresses architecture and signage for commercial development. These guidelines apply to development along the commercial and business sections of Route 1 North within the Town limits. The guidelines discuss architectural design, exterior building materials, façade design, rooflines, building types, sign design, signage content, signage types, and sign lighting. For more detailed information, the Route 1 Design Guidelines document can be found at http://www.falmouthme.org/sites/falmouthme/files/file/file/route_one_design_guide.pdf

Future Land Use

The Town of Falmouth has two designated Commercial/Mixed Use Growth Areas. One is the Route 100 corridor and the other is the Route 1 corridor which includes both the Route 1 South and the Route 1 North study area.

The study area is located partially in the Commercial/Mixed Use Growth Area, as well as in the Residential Growth Area (See **Figure 3** "Future Land Use") The total area within the study area that has a Commercial/Mixed Use designation is 287 acres or 88% of the study area. The total area within the study area that has a Residential designation is 36 acres or 12% of the study area. The Growth Area boundary that separates these two designated areas does not follow property boundaries and should be considered "fluid."

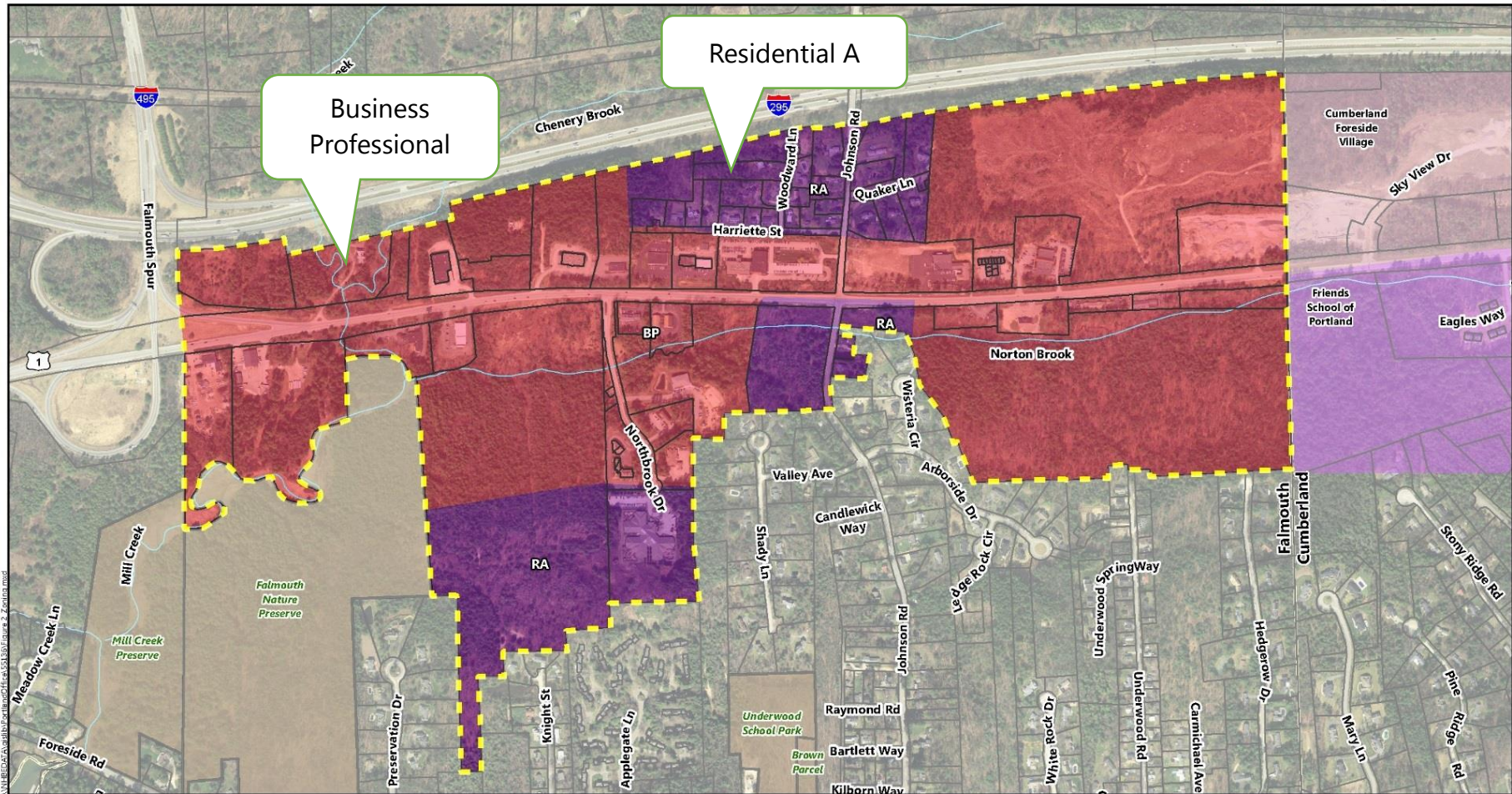
The State of Maine's Growth Management Program directs municipalities to identify growth areas that are most suitable for development and have supporting infrastructure (roads, utilities,

drainage, etc.). The Town's 2013 Comprehensive Plan envisions for the Commercial Growth Areas to encourage compact, efficient development patterns, including mixed-uses, and discourage development sprawl and strip development by promoting nodes or clusters of development. Well-planned residential development is envisioned to be integrated in the commercial areas. Surrounding the Commercial Growth Areas, compact residential growth and infill areas have been located. These areas are envisioned to provide excellent accessibility to the commercial areas and transit links via walking or bicycling ways.

The Route 1 North Designated Growth Area represents one of the key commercial hubs in Falmouth to provide employment and service opportunities for the community. The residential portion of the study area allows for neighborhoods that are particularly well suited to the changing lifestyles of its residents with smaller houses and walkable access to goods and services. The residential land use is proposed to consist primarily of single family homes with multi-family developments being a conditional use.

Existing Land Use

Currently the corridor area contains a mixture of land uses that include office, service type commercial and a small area of single family residential uses. Office uses and vacant land are the primary existing land uses. There are some service businesses such as Sullivan Tire, Gnome Landscaping, and Street Cycles that are located along Route 1. Retail businesses, such as the European Bakery, are existing, non-conforming businesses. The predominantly single family residential area is located west of Route 1 on the north & south side of Johnson Road just west of the properties fronting Route 1. (See **Figure 4**)



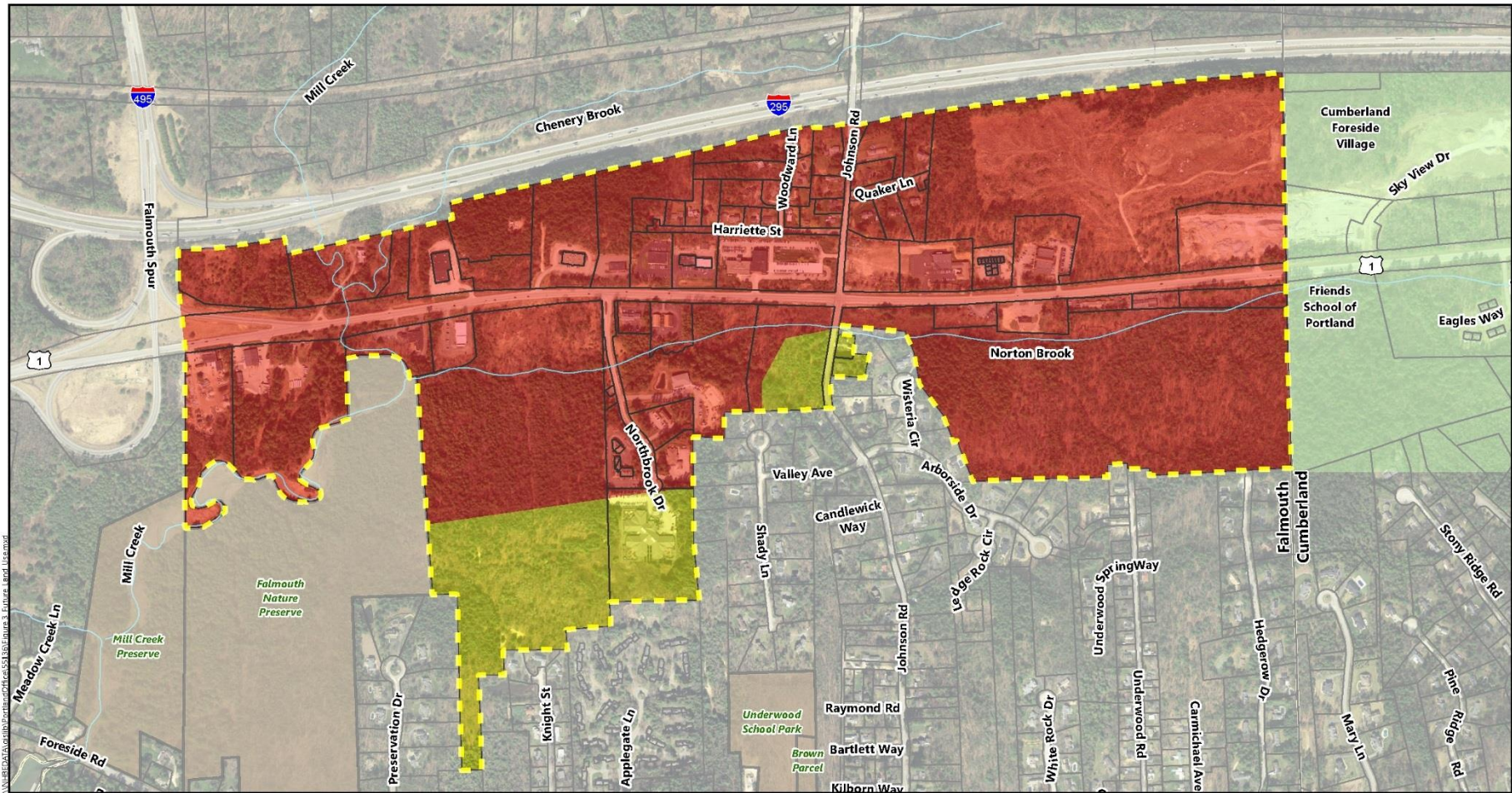
- Legend**
- | | | |
|------------------------|---|---------------------------|
| Approximate Study Area | Business and Professional District (BP) | Office Commercial (South) |
| Town Boundary | Residential A District (RA) | Low Density Residential |
| River/Stream | Tax Parcels (2015) | |
| Public Land | | |

Route 1 North Concept Plan

Town of Falmouth, Maine

Zoning

Source: Town of Falmouth, MEGIS, VHB



Legend

- Approximate Study Area
- Town Boundary
- River/Stream
- Commercial
- Residential
- Expected Growth Area in Adjacent Town
- Tax Parcels (2015)

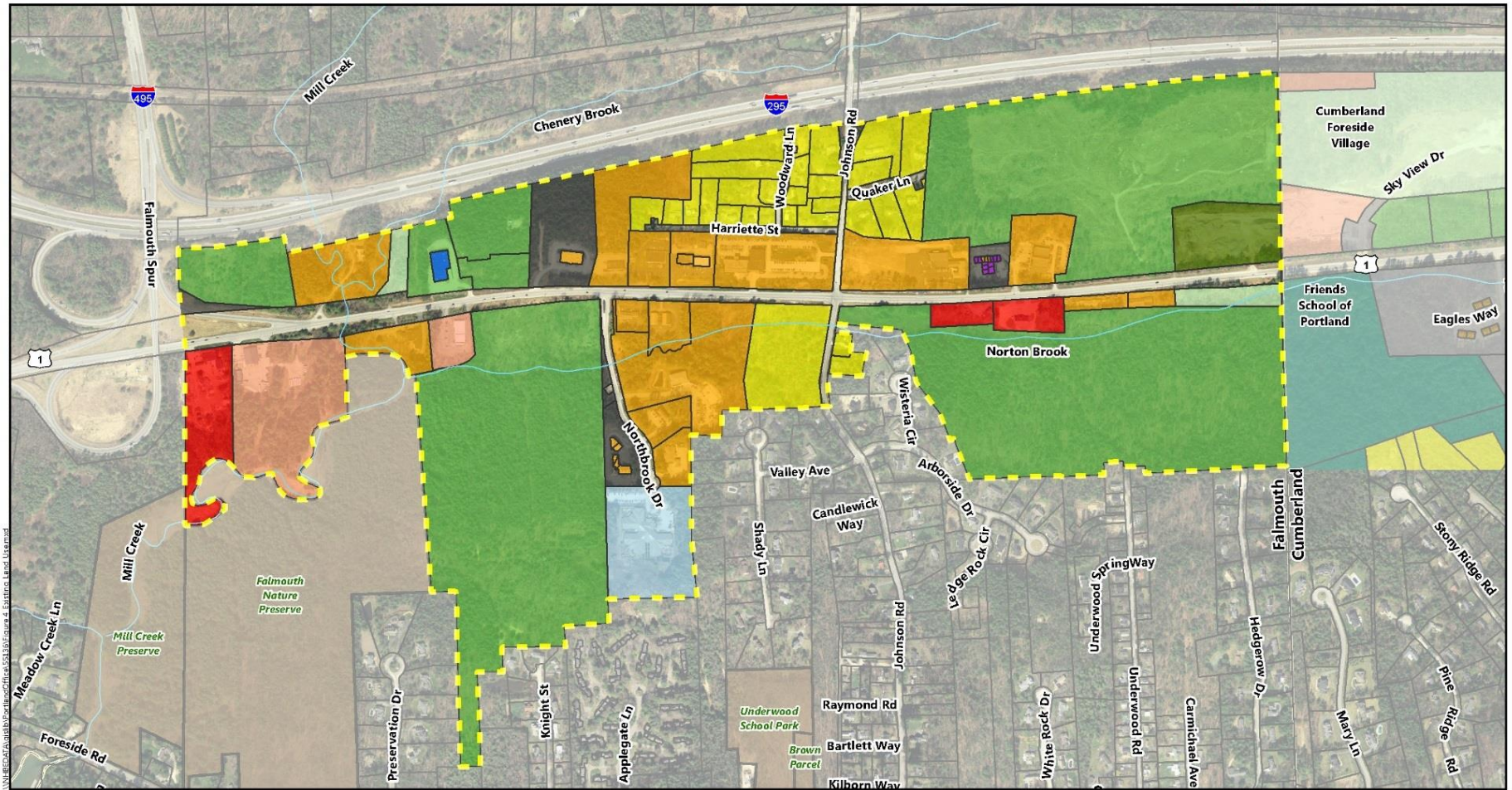
Growth Areas (Draft 2016)

Route 1 North Concept Plan

Town of Falmouth, Maine

Future Land Use

Source: Town of Falmouth, MEGIS, VHB

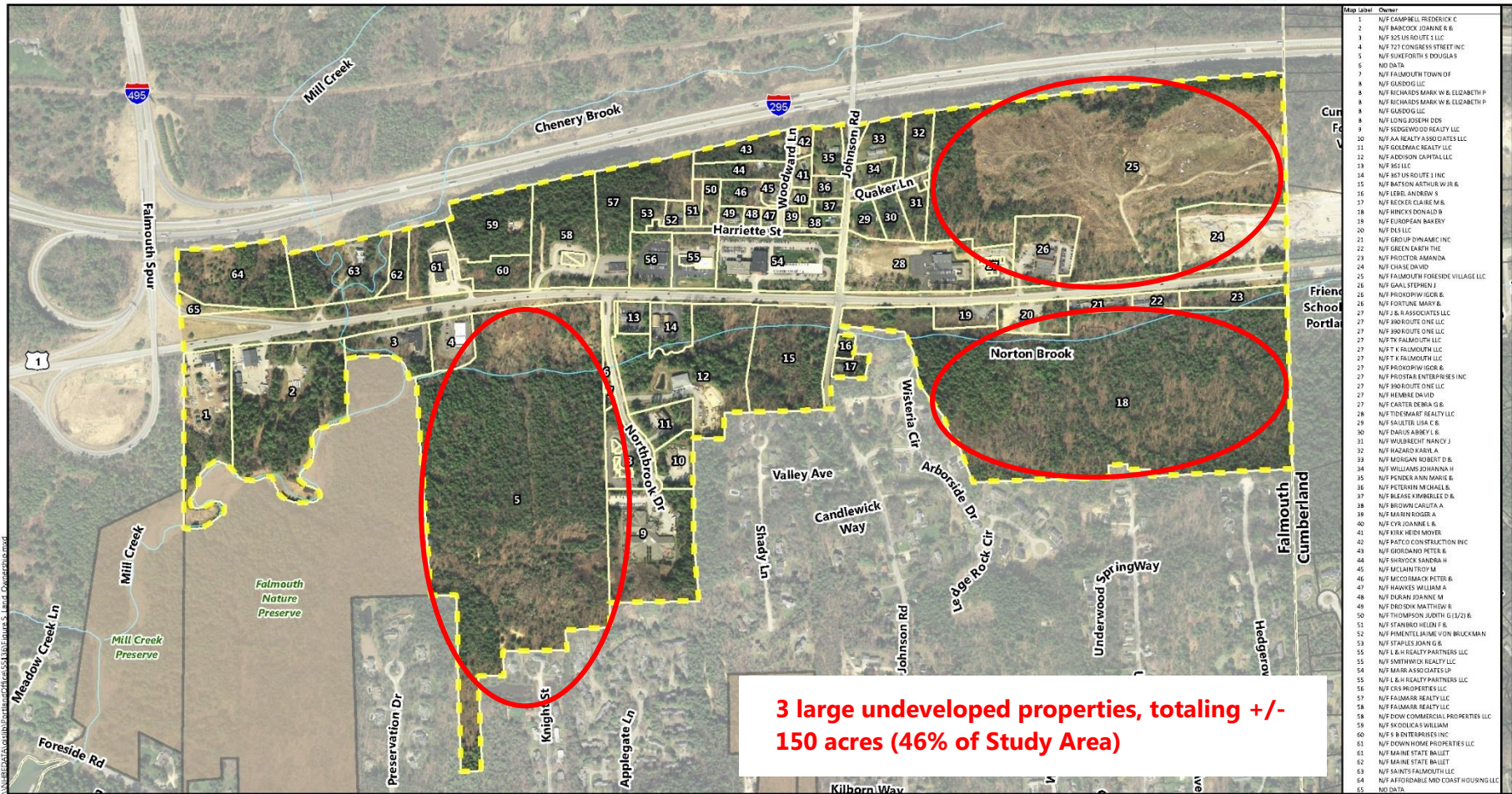


Legend		Land Use	
	Approximate Study Area		Single Family Residential
	River/Stream		Office/Professional Building
	Town Boundary		Condo (Cumberland)
	Public Land		Vacant - Developable Land
	Commercial Retail		Vacant - Potentially Developable
	Commercial Warehouse		Vacant - Undevelopable Land
	Exempt (Cumberland)		Education Building
	Office/Professional Building		Nursing Home
	Vacant - Developable Land		No Data
	Vacant - Potentially Developable		Tax Parcels (2015)
	Vacant - Undevelopable Land		

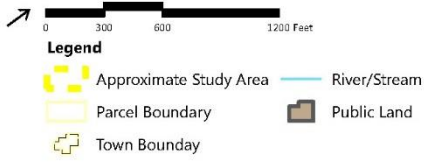
Route 1 North Concept Plan | Town of Falmouth, Maine

Existing Land Use

Source: Town of Falmouth, MEGIS, VHB



3 large undeveloped properties, totaling +/- 150 acres (46% of Study Area)



Route 1 North Concept Plan | Town of Falmouth, Maine
Land Ownership
 Source: Town of Falmouth, MEGIS, VHB

Study Area Analysis

The office properties range in size from 1 to 10 acres, including “Northbrook”, which is an office park that contains multiple office buildings within a campus setting. The office uses within the study area range from relatively new construction to vacant buildings.

Land Ownership

There are approximately 63 property owners within the study area with 3 large undeveloped parcels owned by 3 separate parties which combined are +/- 150 acres or 46% of the total acreage of the study area. See **Figure 5**.

Town of Cumberland

The study area is bordered on the north by the Town of Cumberland. The Town has also designated the Route 1 area as a Growth Area. Land on the west side of Route has been zoned OC-S (Office Commercial South). While that designation does not allow residential uses, the Cumberland Foreside Village project was approved through recent Contract Zoning provisions. The Town has been considering allowing small restaurant and retail uses in this area (less than 3,500 SF), but no drive-through restaurants.

The east side of Route 1 consists of LDR (Low Density Residential) zoning. The latest development in that area has been the Friends School of Portland. That use has triggered the need for a “school zone” mandating lower traffic speeds at certain times of the day.

Utilities

Potable Water service is provided by the Portland Water District. There is an existing 24” ductile iron water main running along the east side of Route 1 coming up into the study area from the south and becomes a 20” ductile iron water main north

of Johnson Road for the remaining portion of Route 1. There is an 8” water main on Johnson Road, Quaker Lane, Harriette Street, and Woodward Lane and a 12” water main on Northbrook Drive. (See **Figure 6** “Utilities and Drainage”)

Sanitary Sewer is provided by the Town of Falmouth. There is an existing pump station at the NW corner of Route 1 and Johnson Road that serves the Route 1 North area, and receives wastewater from a section of Cumberland north of the Town Line. Cumberland currently has a reservation of 40% of the pump station capacity at Johnson Road. There is an 8” PVC gravity main along the west side of Route 1 from the Town line south the existing pump station at Johnson Road and a 4” PVC force main continuing south on Route 1 from the Johnson Road pump station along the Tyler Technologies property and converts to an 8” PVC gravity main going south through the remainder of the study area. There is an 8” PVC sewer main on Johnson Road, Harriette Street, Woodward Lane, and Quaker Lane. Northbrook Drive has an 8” PVC gravity line for the eastern half of the road length to an existing pump station with a 4” PVC force main from the Northbrook Drive pump station to its connection to the 8” PVC sewer main on Route 1. (See **Figure 6** “Utilities and Drainage”) There have been a couple of recent studies prepared that address the sewer capacity in the study area. There do not appear to be any current capacity issues. The projected build-out scenarios do not appear to trigger any future capacity issues. There has been some discussion that the existing 4” force main may need to be increased in pipe size to improve flow downstream from the Johnson Road pump station at some time in the future. The approximate length of new 8” force main would be 1,800 LF at an estimated cost of \$250,000.

Electrical Service is provided by Central Maine Power with overhead line service along the entire length of Route 1 North and Johnson Road within the study area.

Study Area Analysis

Telephone Service is available by a number of providers both land line and wireless including Spectrum, Sprint, AT&T, Verizon and T-Mobile.

Cable TV is provided by Spectrum.

Broadband Service is available by a number of providers including Axiom Technologies, GWI, Fair Point Communications, and RedZone Wireless.

Natural Gas service is available on Route 1 North and Johnson Road (east of Route 1) and is provided by Summit Natural Gas of Maine.

Street Lighting – There are three existing street lights within the study area. Two are located on the east side of Route 1 North with one located at 367 Route 1 North (Casco Bay Professional Park) and the other at the SE corner of Route 1 & Johnson Road. The third existing street light is on the north side of Johnson Road at the Harriette Street intersection.

Environmental Resources & Stormwater Drainage

Publicly available GIS-based natural resource datasets were reviewed to identify protected natural resources and environmental constraints within the study area. This review provides an initial desktop-level evaluation that should be followed with on-site field investigation of any study area locales that may be developed in the future.

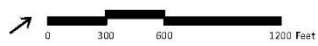
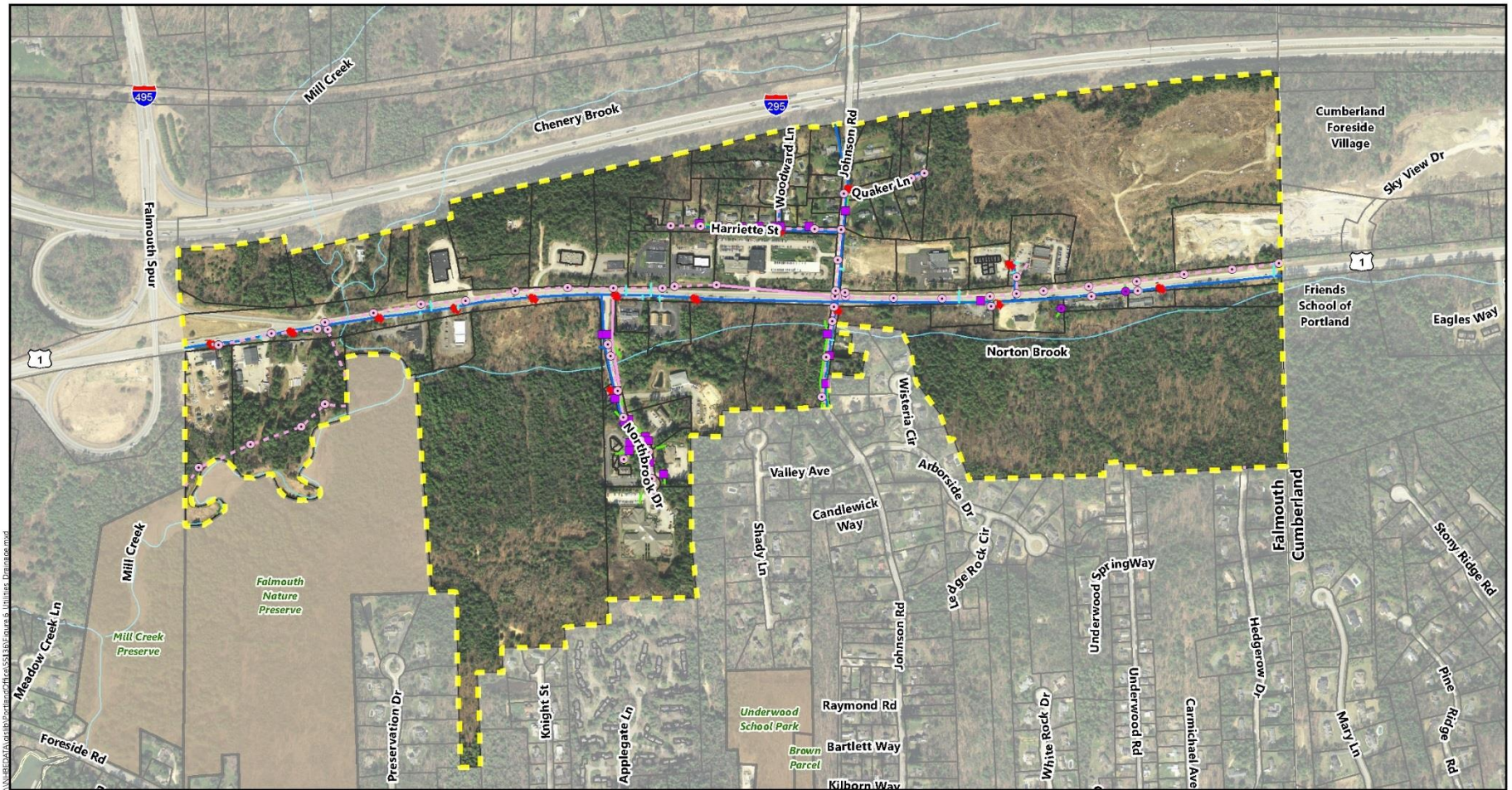
Protected water resources are mapped along much of the east side of Route 1, and just north of the Falmouth Spur (see **Figure 7**). Named watercourses include Norton Brook, Mill Creek, and Chenery Brook. A Federal Emergency Management Agency (FEMA) 100-year floodplain and municipal Shoreland Zone are associated with portions of all three of these watercourses within

the study area. State-designated tidal waterfowl and wading bird habitat is also mapped along the lower portions of Mill Creek.

The Shoreland Zone along the east side of Route 1 has some impact on all the properties fronting on that side of Route 1. Parcel 23 is essentially undevelopable due to the Shoreland Zone comprising the entire parcel. There are some other properties that have been developed on the east side of Route 1 that would not have been able to be developed in the manner in which they were if the Shoreland Zone had been in effect at the time of their construction. Any vehicular access off Route 1 to the parcels on the east side would have to culvert/bridge across Norton Brook similar to developments in Cumberland, such as the Friends School of Portland, Hawks Ridge, and True Spring Farm, which were constructed on the east side of Norton Brook as well as the Northbrook Office Park in Falmouth

Wetlands mapped by the U.S. Fish and Wildlife Service National Wetlands Inventory are associated with these watercourses and other forested portions of the study area (**Figure 7**).

Topographic mapping of the study area (see **Figure 8**) suggests additional unmapped wetlands are likely present in drainage swales on the east side of Route 1. Review of GIS & USGS data, the east side of Route 1 in the study area indicates numerous wetland swales which drain west towards Norton Brook. The topography of the study area depicts that the west side of Route 1 is less likely to support wetlands than the east side of Route 1, with the exception of the drainage swales on the west side of Route 1 that contain Mill Creek and Chenery Brook. The west side of Route 1 is elevated 10'-80' higher than Route 1 sloping up in a generally a westerly direction. There are large areas of existing ledge rock on the west side of Route 1 running primarily parallel to the I-295 ROW boundary.



Legend

- | | | | |
|------------------------|--------------------------------|------------------------------------|---|
| Approximate Study Area | Tax Parcels (2015) | Drainage Man Hole | Portland Water District Water Service Lateral |
| Town Boundary | Sewer Man Hole | Sewer Forced Main | Drainage Collector |
| River/Stream | Drainage Catch Basin | Sewer Gravity Main | |
| Public Land | Portland Water Distric Hydrant | Portland Water District Water Main | |

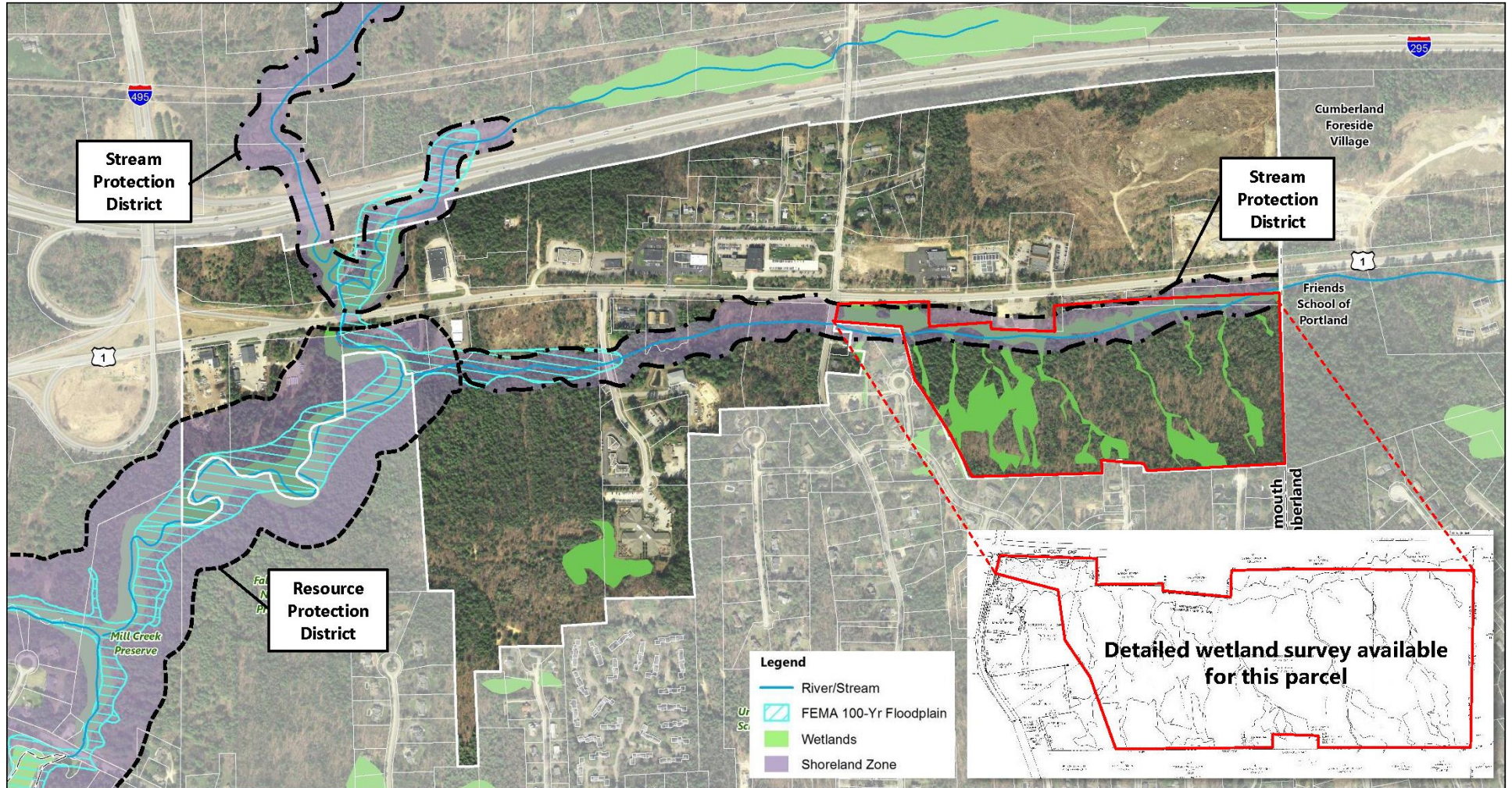
Route 1 North Concept Plan

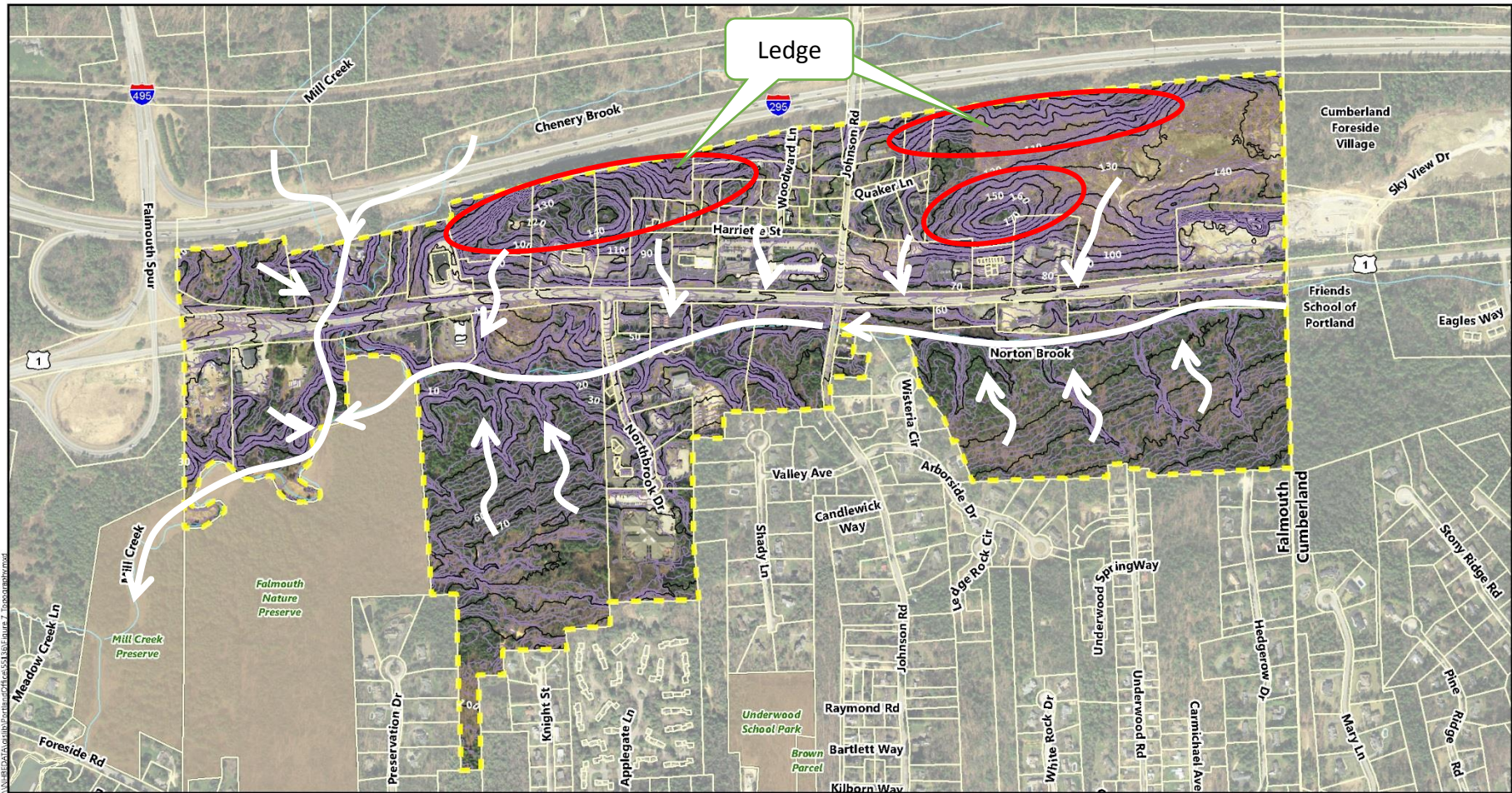
Town of Falmouth, Maine

Utilities and Drainage

Source: Town of Falmouth, MEGIS, VHB

FIGURE 7 Environmental Resources and Constraints





Legend

- Approximate Study Area
- Tax Parcels (2015)
- Town Boundary
- River/Stream
- Public Land
- 2-Ft Elevation Contour
- 10-Ft Elevation Contour Index

Route 1 North Concept Plan

Town of Falmouth, Maine

Topography

Source: Town of Falmouth, MEGIS, VHB

Study Area Analysis

Two state-listed rare plants have been previously documented within or near the study area. Variable sedge is a state-endangered species (no federal status), with two previous occurrences documented in the study area within the Falmouth Spur interchange, and two previously occurrences documented in the study area within forested land on the east side of Route 1. Three previously documented occurrences of the state special concern species smooth winterberry holly (no federal status) are located in forested lands just east of study area.

Disturbance to wetlands, waterbodies, and vernal pools such as filling, grading, grubbing, or mechanized clearing are regulated under Maine's Natural Resource Protection Act (NRPA) and the federal Clean Water Act (CWA) and require permitting. The Maine Department of Environmental Protection (Maine DEP) is responsible for permit review and enforcement under NRPA, while the U.S. Army Corps of Engineers is responsible for enforcing the CWA and reviewing applications under Maine's Programmatic General Permit.

Development within FEMA-mapped floodplains and municipal Shoreland Zone areas typically require municipal review and approval by the Planning Board or Code Enforcement Officer. Depending on the scope of a proposed project, additional permit application review by the Maine DEP may be required under Maine's Stormwater Management Law, Maine's Site Location of Development Law, and the Maine Construction General Permit. On-site wetland, waterbody, and vernal pool field delineations and surveys are recommended prior developing project plans to facilitate the project design and ultimately assess municipal, state, or federal permit application needs.

Mill Creek, which is at the southern end of this study area, is listed by Maine Department of Environmental Protection (MDEP)

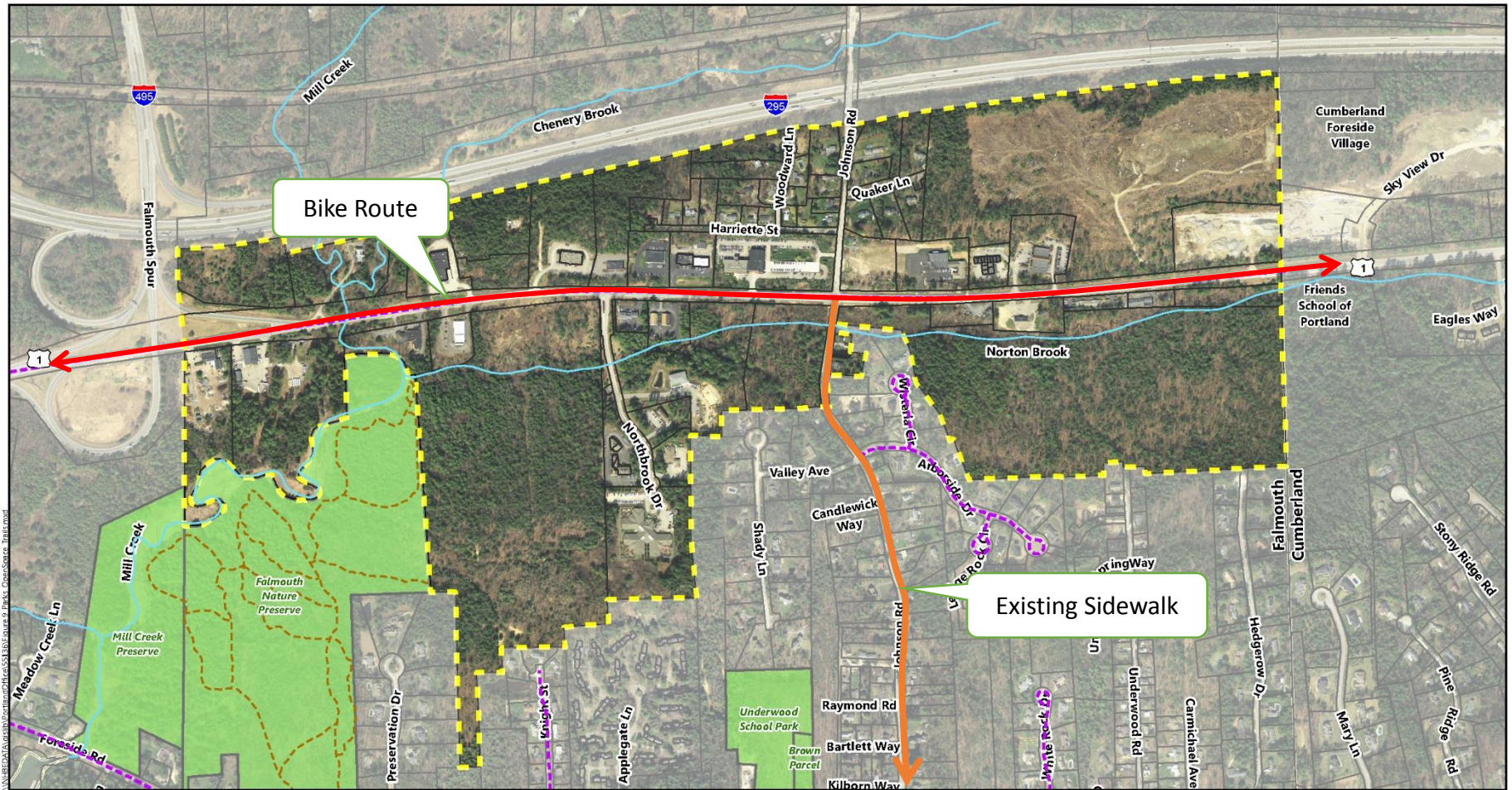
as a NPS (Nonpoint Source) Priority Watershed & MS4 Priority Water. Norton Brook, which is also within this study area running along the east side of Route 1, is listed by MDEP as a Threatened Stream and is a tributary that flows into Mill Creek. Future development and redevelopment in the study area should address stormwater management and water quality to improve and not cause further impacts to the broader watershed. The Town of Falmouth is planning to develop a Norton Brook Watershed Study with the assistance of the Cumberland County Soil & Water Conservation District.

Sidewalks, Trails, Bicycle Paths

There are no sidewalks on Route 1. There is an existing sidewalk on the south side of Johnson Road extending east to Route 88 (Foreside Road). There are no crosswalks, ADA compliant pedestrian facilities or pedestrian signals at the Johnson Road/Route 1 intersection. There are also some unofficial trails that meander through the area east of Route 1 that are accessed from adjacent residential areas to the east of the study area. The 2016 Falmouth Bicycle and Pedestrian Plan indicates an existing bike route on Route 1. See **Figure 9**. However, there is low bicycle activity on Route 1 and Johnson Road. There are 10' wide shoulders on Route 1, but no formal bicycle lanes are provided.

Transit

Metro Bus Route #7 serves the study area running northbound on Route 1 and turning east on Johnson Road towards the Town Landing Market. Within the study area, there is a bus stop on the east side of Route 1 just south of Johnson Road in the vicinity of Tyler Technologies and a bus stop at the NE corner of Northbrook Drive & Route 1.



- Legend**
- Approximate Study Area
 - Trail
 - Tax Parcels (2015)
 - Town Boundary
 - Existing Bike Path*
 - Public Land
 - River/Stream

* Existing Bicycle Route = Road which has a paved shoulder and is suitable for bicycling

Route 1 North Concept Plan

Town of Falmouth, Maine

Open Space, Bike Paths, Trails

Source: Town of Falmouth, MEGIS, VHB

Study Area Analysis

The Route #7 bus has 10 trips per day on the weekdays & Saturdays and 5 trips per day on Sunday. The hours of operation are 6:30AM to 7:30PM Monday – Saturday and 9:30AM to 5:30PM on Sundays.

Based on ridership numbers provided by Metro Bus, the average number of passengers either boarding or getting off the bus in the Study Area Monday to Friday is approximately 1-2 passengers a day, 1.5 passengers per day on Saturdays, and 1 passenger every two weeks on Sundays.

Route #7 is the least frequently run route in the Metro system with a bus running every hour versus every 20 minutes for most other routes.

Transportation

Route 1 is classified by MaineDOT as a Major Urban Collector in this segment and has Annual Average Daily Trips (AADT) of 9,239 cars per day from the Falmouth Turnpike Spur to Johnson Road and 7,763 AADT from Johnson Road to the Cumberland Town Line.

Route 1 has a posted speed limit of 45 mph from the Falmouth Turnpike Spur north to approximately 600 LF south of the Town line where it changes to 50 mph. Johnson Road has a posted speed limit of 30 mph. A school zone exists just north of the Town line.

Pavement improvements were recently completed by MaineDOT on Route 1 within the study area.

The intersection of Johnson Road & Route 1 is signalized and is the only traffic signal within the study area. Johnson Road provides an important connectivity function to Route 88 (Foreside Road) and the neighborhoods to the west of I-295.

Visual Assessment



View of Route 1 North Looking South at Town Line



Falmouth Self Storage



Existing Business Offices



Street Cycles

Visual Assessment (cont'd)



TideSmart Global



Johnson Road & Route 1 North
Intersection



Tyler Technologies



Existing Office Buildings



Casco Bay Professional Park



Northbrook Office Building



Norton Brook



Dow Wealth Management &
Cianbro Office Buildings



Route 1 Looking North at Sullivan
Tire



Sullivan Tire



Maine State Ballet



Route 1 at Falmouth Spur

Current Real Estate Market

RKG Associates, Inc. prepared a preliminary market assessment of the Route 1 North Study Area to better understand the socioeconomic and Real Estate indicators influencing the corridor. The following is a summary of RKG's findings. The complete memorandum from RKG can be found in **Appendix B**.

- ▶ Route 1 North has seen slow, but steady, growth over the past several years, with a mix of small office, professional and service users
- ▶ The submarket (Falmouth/Yarmouth/Cumberland) represents about 8-10% of the 11.8 million SF Greater Portland Metro regional office market.
- ▶ Falmouth's share of forecasted office space growth is small (1,500 SF/yr), with existing vacancy available to absorb most of the demand.
- ▶ Demand for speculative commercial construction is low, therefore new commercial development should be focused on build-to-suit owners/users.
- ▶ Retail potential may be limited in the Route 1 North area based on lower traffic counts and population density. Retail development would need to be more locally focused.
- ▶ Redevelopment of Route 1 South into a mixed-use destination neighborhood (with commercial in-fill & MF residential) will allow Falmouth to capture greater share of future regional demand for office, retail and flex/service space.
- ▶ Development of Route 1 North should not compete with Route 1 South and Turnpike Spur Interchange Development Area. Concentrate development activity: commercial, office, retail and multi-family development activity at the Interchange Area and Route 1 South. Route 1 North should focus on end

users, technology users, and non-residential uses on the West side of Route 1. A mix of non-residential and residential uses can be assembled along the east side of Route 1 North.

Stakeholder/Public Input

Two public workshops were held during the planning process where over 60 participants offered valuable input. The online survey received a total of 230 responses over the period of one month. Common themes emerged from the public outreach process are listed below:

Land Use/Development

- ▶ Introduce land use types that are compatible with surrounding context
 - Buffers between incompatible uses
- ▶ Consider mixed-use development
 - More flexibility with zoning to allow more land use options
- ▶ Complement & not detract from Route 1 South
- ▶ Consider Restaurants & Retail in the study area
 - Small scale not strip commercial
- ▶ Consider Residential Development
 - Balance business activity and residential options
- ▶ Provide aesthetic improvements – streetscape/lighting

Mobility

- ▶ Balance all "modes" of traffic (cars, bikes, pedestrian, bus)
 - Provide safe pedestrian, bicyclist & transit facilities
 - Designated pedestrian & bike lanes

Study Area Analysis

- Controlled crosswalks at Johnson Road intersection
- Improved bus stops

Environmental/Open Space/Recreation

- ▶ Provide trails & connections to existing trails
- ▶ Preserve natural resources
 - Protect Norton Brook
 - Open Space & tree protection
 - Protect Mill Creek watershed

Issues and Opportunities

Following the Study Area Analysis and first Public Forum, issues and opportunities for the Study Area were identified and diagrammatically illustrated on **Figure 10** and listed below:

- ▶ **Gateway:** Falmouth Spur 11 acres. The cloverleaf interchange is proposed to be converted to an at-grade intersection with a roundabout. A new at-grade intersection will result in some excess ROW that could give adjacent property owners better access to Route 1. The 11 acres of land where the on-ramp onto the Spur is currently located will then be available for development. This new intersection will serve as a new gateway opportunity for entering Falmouth from the Turnpike as well as entering the Route 1 North & Route 1 South areas of Town.
- ▶ **Opportunity Sites:** Three 50 acre parcels undeveloped that comprise 60% of the land within the Route 1 North Study area
- ▶ **Johnson Road Intersection:** This intersection needs designated left turn lanes on Route 1 for safety, as well as pedestrian, bicycle & ADA accessibility improvements.

- ▶ **Sanitary Sewer:** Potential need to upgrade existing Johnson Road pump station and replace 1750 LF of 4" force main to better accommodate future flow from future development in the study area and the Town of Cumberland.
- ▶ **Improved Pedestrian & Bicycle Facilities and Open Space & Trail Connections** Opportunity to connect unofficial Underwood Park Trail into proposed Norton Brook Trail & Falmouth Nature & Mill Creek Preserve trail system.
- ▶ **Opportunity to improve Norton Brook** within Shoreland Protection zone. Town could acquire undevelopable land to develop a master stormwater management system with stream restoration and develop a more attractive public amenity with trails – potential to sell credits to developers to help recoup funds, seek State grant funding
- ▶ **Mill Creek watershed:** Future development & redevelopment needs to not negatively impact Mill Creek – incentives to manage stormwater above what State minimums require. Improve water quality and stormwater management
- ▶ **Coordination with PACTS Complete Streets:** In a separate, but concurrent, PACTS-funded study, for Complete Street improvement opportunities along Route 1 in Falmouth, Cumberland, and Yarmouth, TY Lin International presented some early recommendations for Falmouth that included continuing the proposed 3-lane road section that has been designed for Route 1 immediately to the north of the study area in Cumberland south to Johnson Road. A 10' wide shared use path was proposed on the west side of Route 1 as a pedestrian & bicycle extension/connection to Cumberland an points north. The TY Lin recommendations also included proposed Route 1 and Johnson Road intersection improvements to add designated left turn lanes on Route 1 for northbound and southbound vehicles turning onto Johnson

Study Area Analysis

Road, pedestrian/bicycle crossing upgrades, and the shared use path crossing to the east side of Route 1. TY Lin early recommendations provided a 2-lane and 3-lane option for Route 1 south of Johnson Road to the Falmouth Turnpike Spur with both options including the 10 shared use path on the east side of Route 1 and a 5' sidewalk on the west side to accommodate pedestrian use adjacent to existing office developments on that side of Route 1.

The Public Forum and Route 1 North Committee feedback was to explore a combination of the 3-lane & 2-lane road section with the potential to utilize the existing pavement section (+/- 44' width) to accommodate both the northbound and southbound vehicular lanes and proposed bicycle/pedestrian improvements to reduce construction costs. Travel lane transitions were studied to go from a 3-lane section to a 2-lane section and back to a 3-lane section based on posted speed limits and the length of those transitions provided short sections of road that would not be in transition and resulted in essentially a weaving pattern from 3-lane section to 2-lane section and back to a 3-lane section.

- ▶ **Gateway Opportunities** at Falmouth Turnpike Spur & Route 1 area, Town Line with Cumberland, and Johnson Road intersection.
- ▶ Current **Zoning** allows only a limited variety of uses
- ▶ Only one major road intersection within the study area so each individual property has its own driveway/entrance onto Route 1. As study area develops there will be an abundance of access points and traffic entering and exiting the roadway – consider **shared access or access management plan**
- ▶ **Opportunity to create an identity:** Healthy active community, assets include recreation, arts, culture

- ▶ Small population of **young adults** (ages 25-29) living in Falmouth which could impact companies on Route 1 North looking for employees – Town may not be meeting what young adults need in terms of the type of community they wish to live in or housing available that they can afford
- ▶ Growing segments in Maine are software, IT, Medical, Financial, insurance and environmental services
- ▶ **Opportunities:** Limited space in Portland (peninsula) in long run – housing shortages throughout the region
- ▶ Need for **Town to “market” Route 1 North** to state and regional businesses – focus on Class A office space – promotional material, website, network with commercial real estate professionals.
- ▶ **Review zoning** requirements to ensure that buildings in the Route 1 North area are able to include cafes, gyms and other mixed-use amenities as “attractors”
- ▶ **Create and promote energy efficiency & conservation** – solar, recycling, recycled building materials, LEED certified techniques – incentives – research funding & grants for implementation of sustainability projects
- ▶ **Buildable Areas:** Based on the Town’s GIS data and Town Code of Ordinances, a preliminary analysis was done to look at the three large undeveloped properties along Route 1 and a few potential redevelopment parcels to better understand the impact the environmental constraints in the study area e.g. Norton Brook, Shoreland Zone, floodplain, Mill Creek, wetlands, steep slopes and ledge would have on their developability.

Non-Residential net building area does not stipulate that sustained slopes in excess of twenty-five (25%) percent be subtracted from the gross acreage of a property when

Study Area Analysis

calculating net buildable area as it does for Residential uses.

Figure 11 illustrates that the properties on the west side of Route 1 are 100% developable for non-residential though there are slopes in excess of 25% and ledge rock that would result in higher site development costs. Properties on the east side of Route 1 are impacted by the presence of Norton Brook, Mill Creek, Shoreland Zone, floodplain and wetlands that results in those properties being 31% to 89% developable for non-residential uses.

Residential net building area does stipulate that sustained slopes in excess of twenty-five (25%) percent be subtracted from the gross acreage of a property, in addition to Shoreland Zones, floodplain, and wetlands when calculating net buildable area. **Figure 12** illustrates that all of the highlighted properties are impacted by the presence of these conditions and range from being entirely unsuitable for residential development to approximately 60% developable for residential uses.

FIGURE 10 Route 1 North Issues and Opportunities

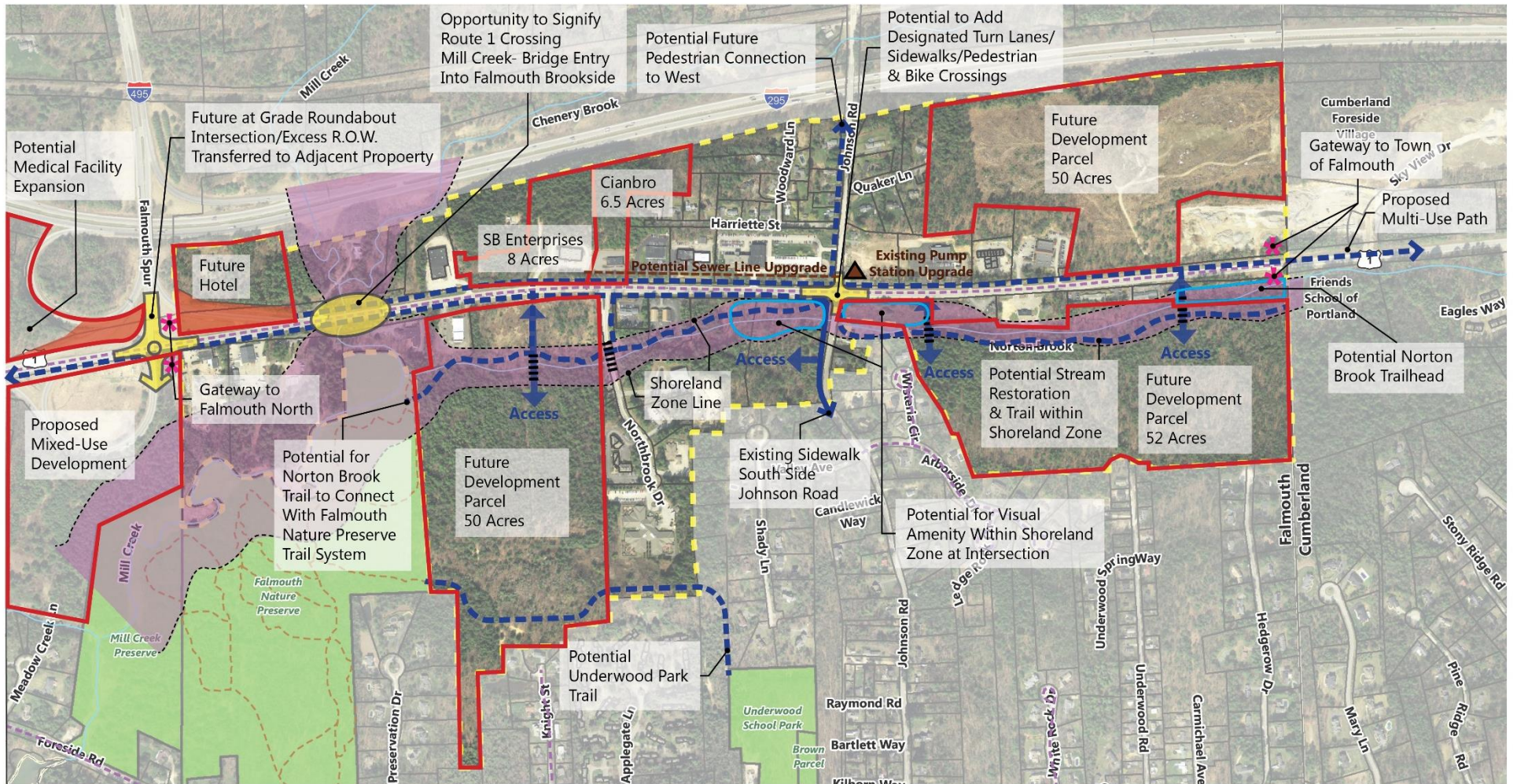
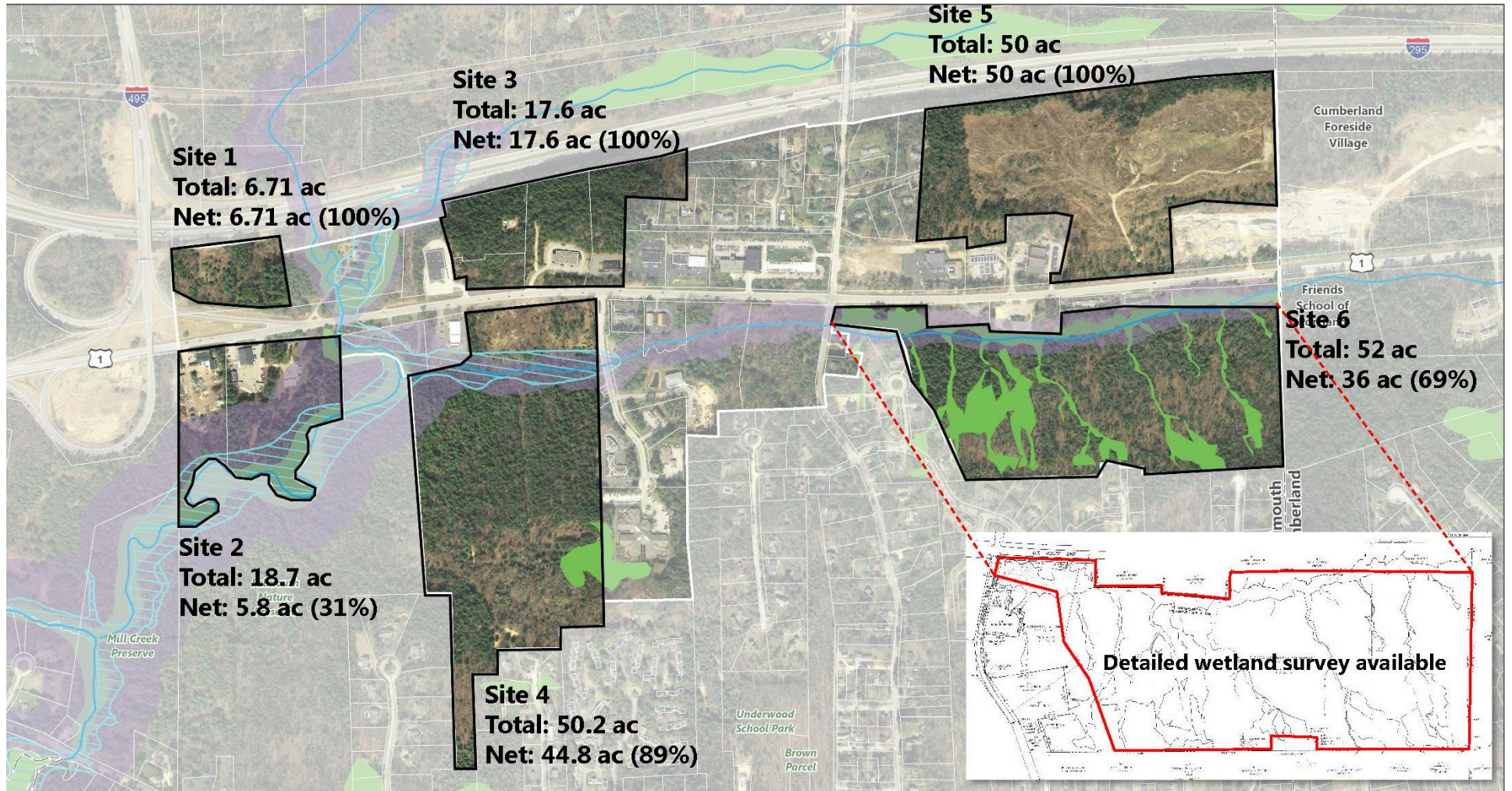
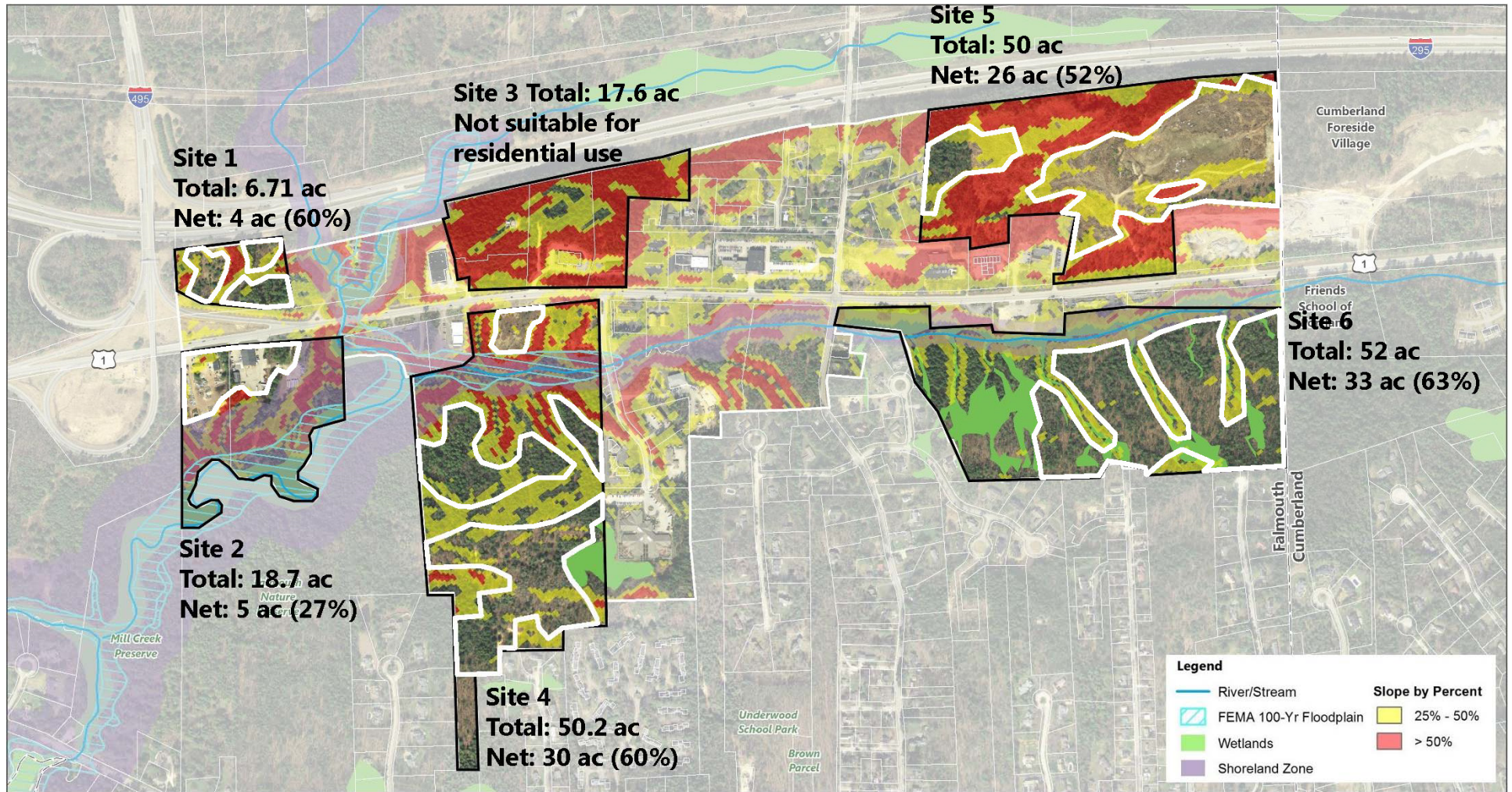


FIGURE 11 Non-Residential Net Buildable Area (approximate)



Note: Excluding shoreland zone, wetlands, and flood zone

FIGURE 12 Residential Net Buildable Area (approximate)



Note: Excluding shoreland zone, wetlands, flood zone, and 25% greater slopes

This page left blank.

Route 1 North Vision

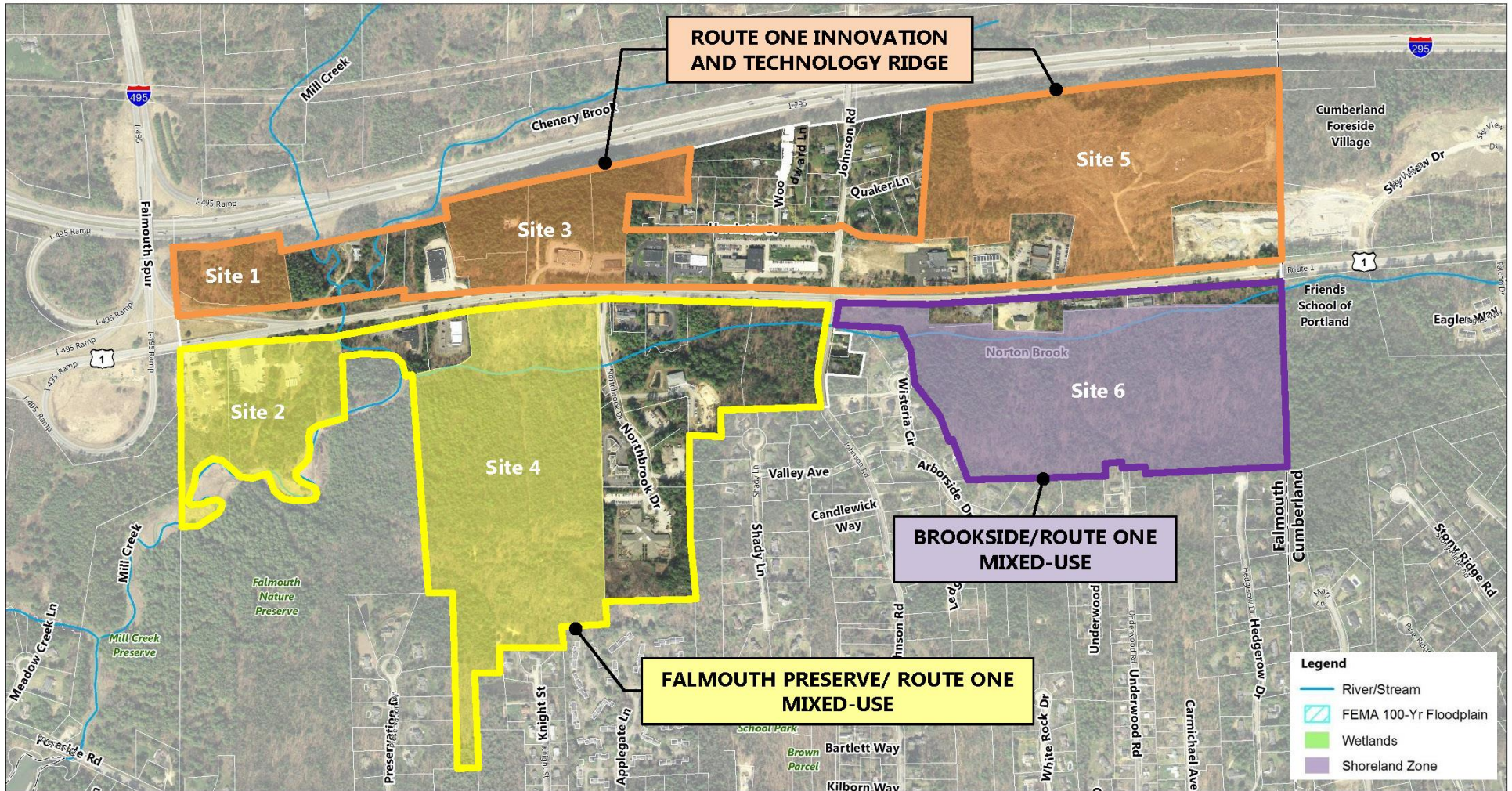
3

Core to the development of the Vision Plan are the following project goals that were developed by the Route 1 North Committee. They summarize the public input received and issues/opportunities identified in the Study Area analysis phase, and are the foundation for the Vision Plan and recommendations.

Goals

- ▶ Encourage development in the Route 1 North designated growth area.
- ▶ Provide mobility improvements and transportation choices to residents, businesses, and commuters to encourage individual and community well-being and public safety.
- ▶ Improve transportation safety and access for pedestrians, bicyclists, transit riders, and drivers along & through the corridor.
- ▶ Improve aesthetics on Route 1 North making it an attractive place to work, live, and play.
- ▶ Create a Route 1 North identity that complements Route 1 South.
- ▶ Coordinate land use and transportation decisions by regulating safe and reasonable access between Route 1 North and adjacent land.
- ▶ Preserve, protect and enhance the character of the corridor, property values and the economic viability along the Route 1 North corridor by managing growth and development.
- ▶ Protect environmentally sensitive areas such as streams, creeks, wetlands, steep slopes, and other quality natural resources, from impacts of incompatible development in the Route 1 North Study Area.

FIGURE 13 Conceptual Land Use Framework



Route 1 North Vision

- ▶ Strengthen connections to existing environmental corridors, open spaces, and preserves.

The Committee further developed these goals into a Vision for the Route 1 North Study Area that is comprised of three districts (see **Figure 13**):

- Route One Innovation and Technology Ridge District,
- Brookside/Route One Mixed Use District, and
- Falmouth Preserve/Route One Mixed Use District.

The following describes the vision for each district as it pertains to land use, mobility, and open space, recreation and amenities.

Vision

Route One Innovation and Technology Ridge District

(West side Route One Falmouth Spur to Cumberland Town Line)

Land Use

The vision for the Route One Innovation and Technology Ridge District's land uses (see **Figure 14**) is to encourage and allow businesses driven by knowledge workers in high tech manufacturing, software, media, advanced materials, healthcare office, creative industries, engineering, and light industrial uses. This continues the existing Business Professional (BP) zoning for this area. The goal is to attract those types of businesses where the jobs multiplier for other services jobs in the region are created in larger multiples than typical professional services or warehousing jobs. In addition to these types of uses, the area South of Mill Creek on the west side of Route One at the Falmouth Turnpike Spur is encouraged to also include hotel or multi-family residential due to the proximity of the Spur

intersection with Route One and immediate connectivity to the Falmouth Route One South core. Sites 1, 3 and 5 are within the Route One Innovation and Technology Ridge area.

Site 5 was subject to considerable discussion by the Route 1 North committee, land owner, general public, and the consultants. A majority of the committee (4 of 7 members) supported continuing the existing Business Professional (BP) zoning. The BP district includes business and professional offices and retail service, but no residential uses. The merits and concerns of the potential inclusion of residential uses on site 5 were weighed. A committee minority (3 of 7 members) advocated for expanding the list of permitted uses to include residential uses on site 5.

Open Space, Recreation and Amenities

The workers in the Route One Innovation and Technology Ridge District are anticipated to have a strong environmental ethos and a desire for community connection to the Falmouth Route One South core. They will likely embrace the proximity to the natural woods, streams, and park resources in the Route One North corridor. They are expected to readily use the nearby retail, services, and entertainment, health care, and fitness options in the Falmouth Route One South area. Access to these services in a convenient manner, and lots of food and dining choices are a plus for success in the attraction and retention of the targeted business types and their employees. The positive economic impact will strengthen the businesses in the area and help to increase occupancy levels in Route 1 South, such as at the Falmouth Shopping Center. (see **Figure 15**)

Mobility

The transportation framework (see **Figure 16-21**) is expected to provide safe, pleasant and convenient access to and from the

Route 1 North Vision

Route One corridor. Workers, visitors and employees in this corridor will continue to rely primarily on auto transport, although bus transit service from Portland to Freeport is available in the early stages of building ridership. Appropriate bus stop and shelter facilities should be provided. Safe bicycle and pedestrian access is critical to creating an environment for the knowledge workers and the creative class of employees. Conflicts between bike/pedestrian access and new access points for the Route One Innovation and Technology Ridge District will be minimized with the design and implementation of a separate bike/pedestrian shared use path on the west side of Route One.

Brookside/Route One Mixed Use District

(East side Route One North of Johnson Road)

Land Use

Given the topography and dissected wetland resources, this area is devoted primarily to smaller footprint residential and smaller professional office uses (see **Figure 14**). The Route One frontage areas are envisioned to be devoted to office, technology and innovation uses that have small scale requirements. The areas east of Norton Brook are more appropriate for residential uses as they abut existing residential neighborhoods off Route 88. Restaurant and small retail uses are encouraged in close proximity to employees, visitors and residents in this area. Site 6 is within the Brookside/Route One Mixed Use area.

Open Space, Recreation and Amenities

The residents and employees in the Brookside/Route One Mixed Use area will have access to trails and pedestrian connections along Norton Brook, with key crossings to Route One. The trails will also connect to the environmental preserve areas to the south. Area users are expected to appreciate the proximity of retail, grocery, services, entertainment, health care and fitness

options located in the Falmouth Route One South area. They will also be able to utilize the sidewalk connection to Johnson Road to access Route 88 and the Town Landing area. (see **Figure 15**)

Mobility

The transportation framework (see **Figure 16-21**) is expected to provide safe, pleasant and convenient access to these areas. The multiple Route One frontages will require coordinated access points. The transit stops will also require shelter and lighting to encourage ridership and accommodate the transit rider. Bike/pedestrian connections and Route One crossings will be demarcated to provide access to the shared use path on the west side of Route One.

Falmouth Preserve/Route One Mixed Use District

(East side Route One South of Johnson Road)

Land Use

The vision for the Falmouth Preserve/Route One Mixed Use District (see **Figure 14**) is to acknowledge the diverse site conditions that exist in this area. The parcels that front of Route 1 in this area can accommodate business, technology and innovation uses or retail uses, taking advantage of the developable land along Route One. East of Norton Brook various mixed uses can be accommodated, as long as access to these areas can be created. Residential uses are envisioned to be appropriate as this area abuts existing residential neighborhoods. This would reinforce a great neighborhood environment near the Falmouth Preserve. Various densities and special residential uses can be mixed in this area to encourage knowledge workers to reside in Falmouth and walk to work. Alternatively, with the provision of adequate buffering, business, innovation and technology uses could be accommodated on portions of the property.

Route 1 North Vision

To accommodate the growing use of the Falmouth Nature Preserve, and to enhance the Route One North corridor, the provision of new limited auto parking could be provided in concert with the development of Site 4. Preservation of sensitive environmental resources lands in this area, adding to the Falmouth Preserve, would enhance the character of this area.

In addition to these types of uses, the area South of Mill Creek at the Falmouth Turnpike Spur on the east side of Route One is encouraged to include hotel or multi-family residential due to the proximity of the Spur intersection with Route One, the connectivity to the Falmouth Route One South core, and future development at the Spur interchange area. The existing land uses on these properties may not be the highest and best use for their location as the Route One North area continues to develop and evolve. Sites 2 and 4 are within the Falmouth Preserve/Route One Mixed-Use area.

Open Space, Recreation and Amenities

The Falmouth Preserve/Route One Mixed Use area provides a great environmental framework given its proximity to the Falmouth Preserve. As noted, improvement in this area to include vehicular parking for the Falmouth Preserve would broaden the Preserve's attraction to serve more Falmouth residents and Route One North workers and visitors. With a bike/pedestrian shared use path linking the Interchange Area and the Falmouth Route One Core, this area will have excellent access to services, retail, restaurant, entertainment, health care and fitness options in the Route 1 South area. (see **Figure 15**)

Mobility

The transportation framework (see **Figure 16-21**) is envisioned to be developed to accommodate a range of uses, depending upon their intensity. The Johnson Road intersection should be

improved to provide new designated left turn lanes on Route One onto Johnson Road. Just south of Johnson Road, the developer of Site 4 may choose to pursue a major connection from Route One with a major crossing of Norton Brook to access the rear of the property. Alternatively, the developer of Site 4 could pursue a potential access point from Northbrook Drive within the Northbrook Office Park, in the vicinity of the existing pump station. Bike/pedestrian access are expected to have coordinated stream crossing locations, as the shared use path will be shifted to the east side of Route One to connect to the Falmouth Route One South area.

FIGURE 14 Conceptual Land Use Scenario

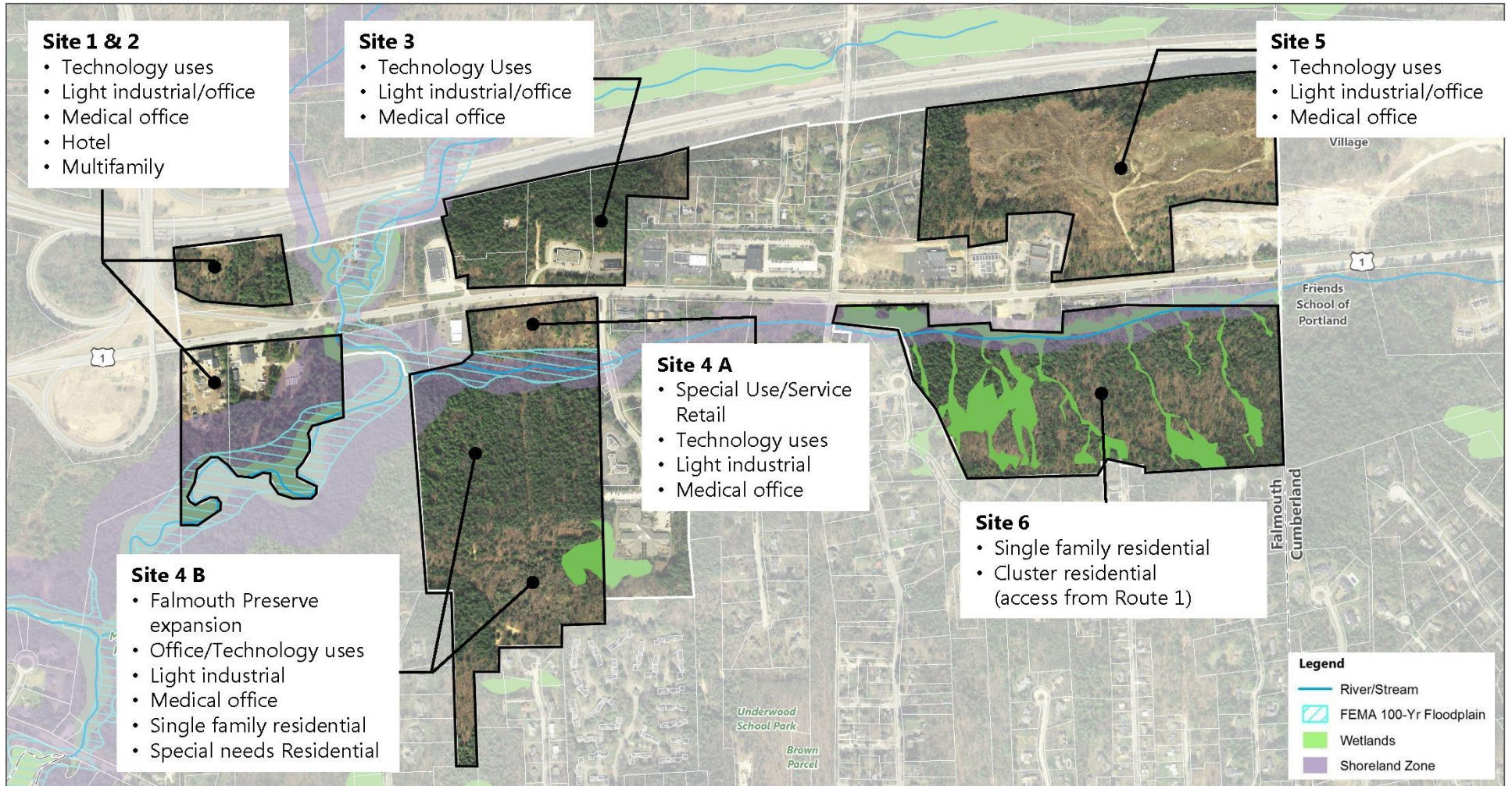


FIGURE 15 Conceptual Environmental Framework

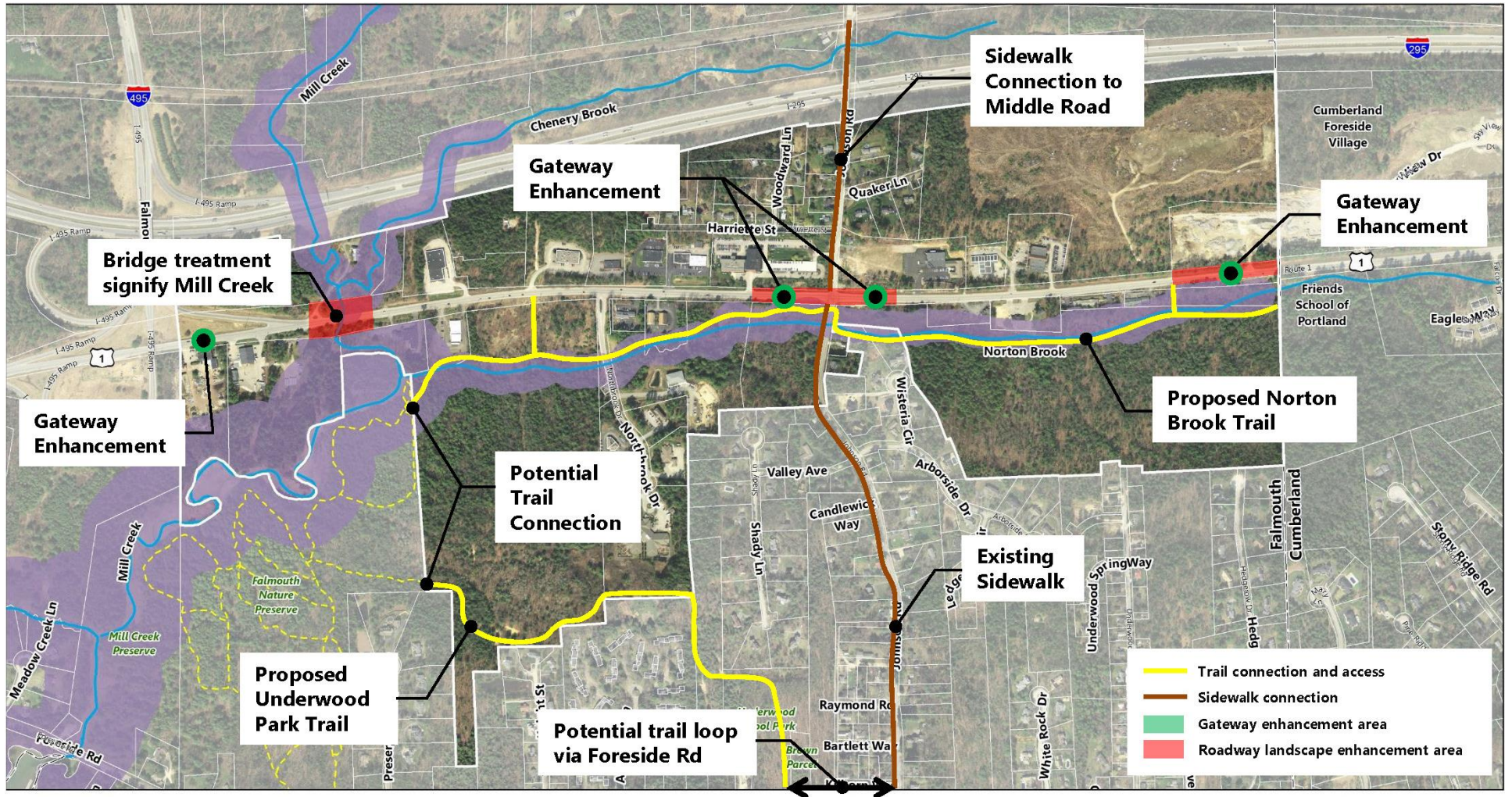


FIGURE 16 Johnson Road/Route 1 Intersection Plan – south of Johnson Road

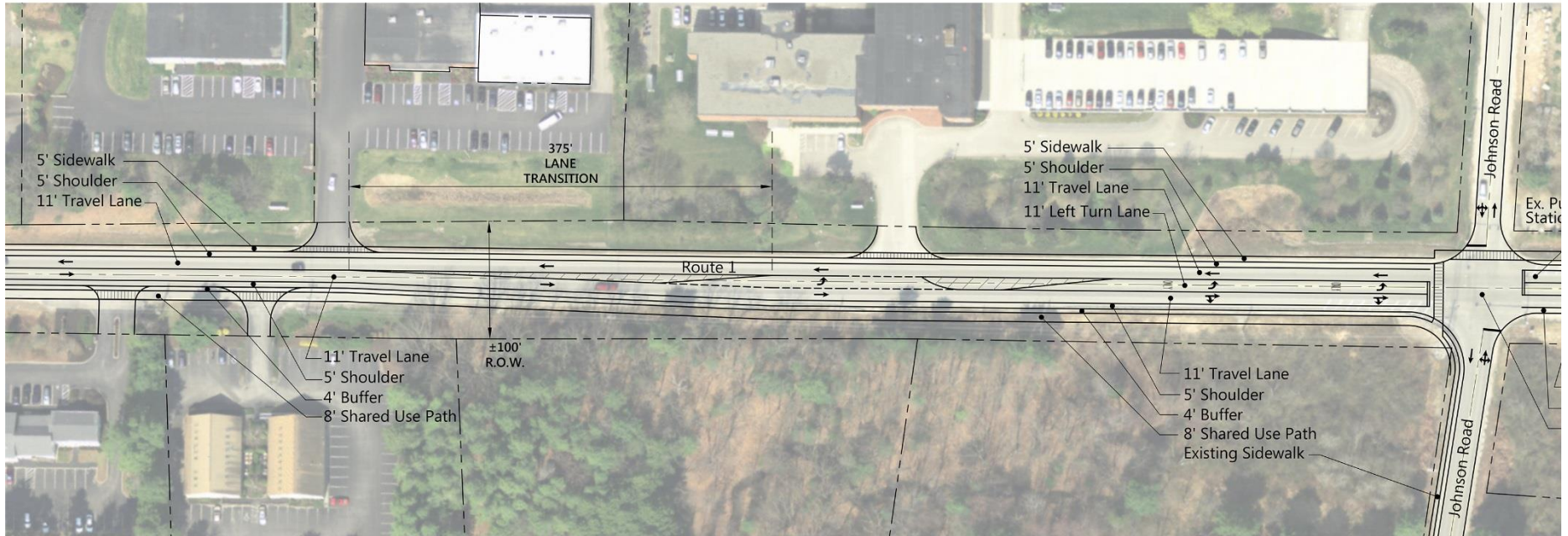


FIGURE 17 Johnson Road/Route 1 Intersection Plan – north of Johnson Road

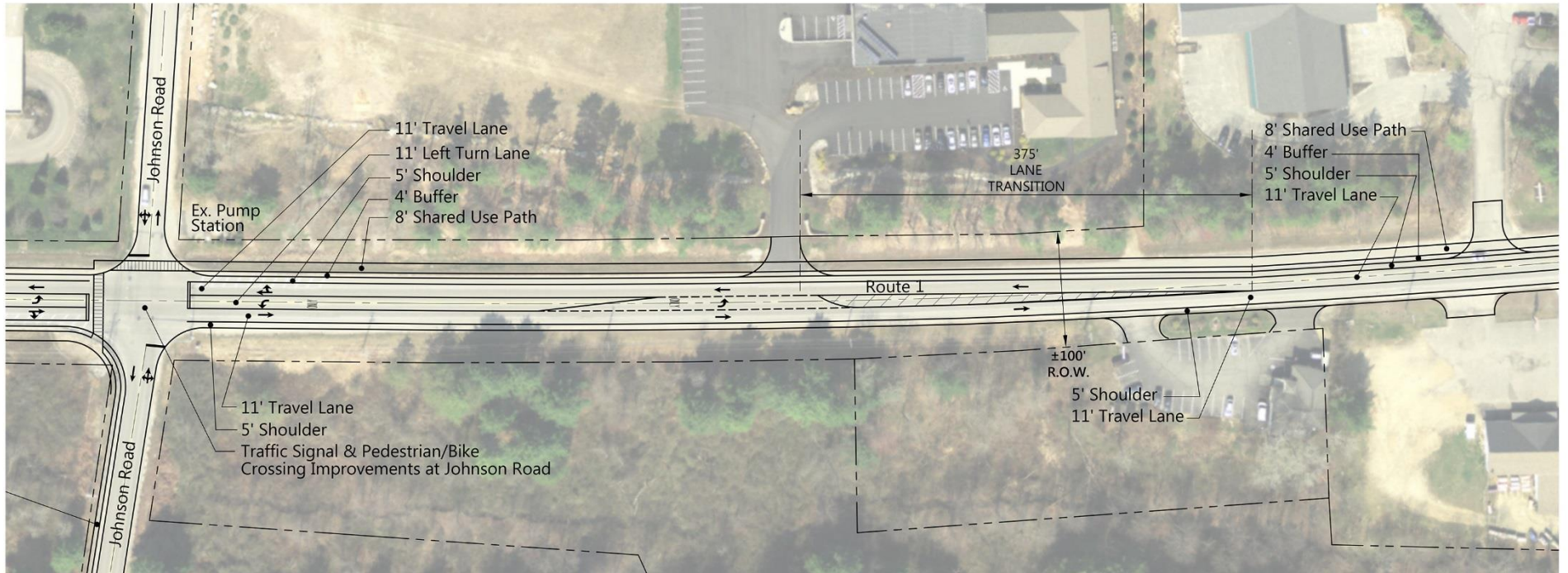
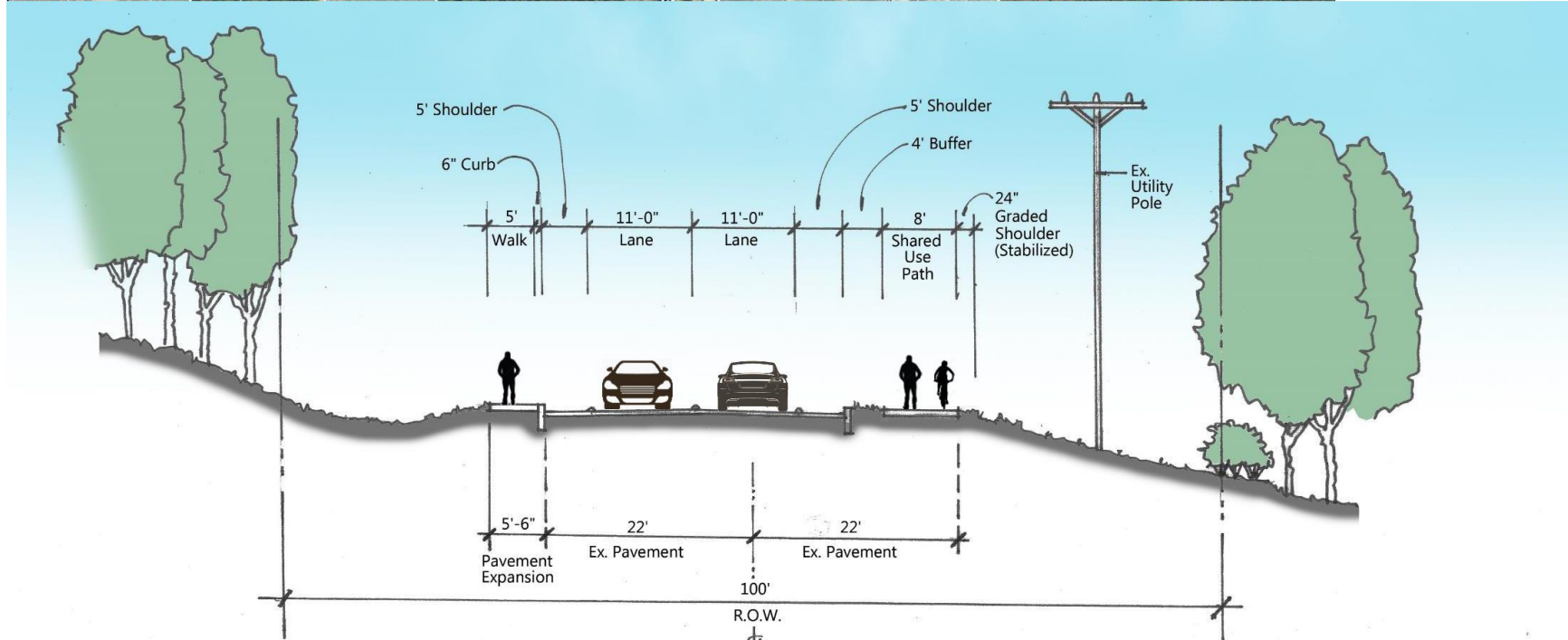


FIGURE 18 Study Area Route 1 Cross Section – 2 Lane Section south of Johnson Road



Note:
 AASHTO Design Standards recommend 10' Min. Width for shared use paths with a reduced width of 8' acceptable where environmental, historical, and/or structural constraints occur and lower use volumes are expected

2 Lane Section
 South of Johnson Road
 (Looking Northbound)

FIGURE 19 Study Area Route 1 Cross Section – 3 Lane Section south of Johnson Road

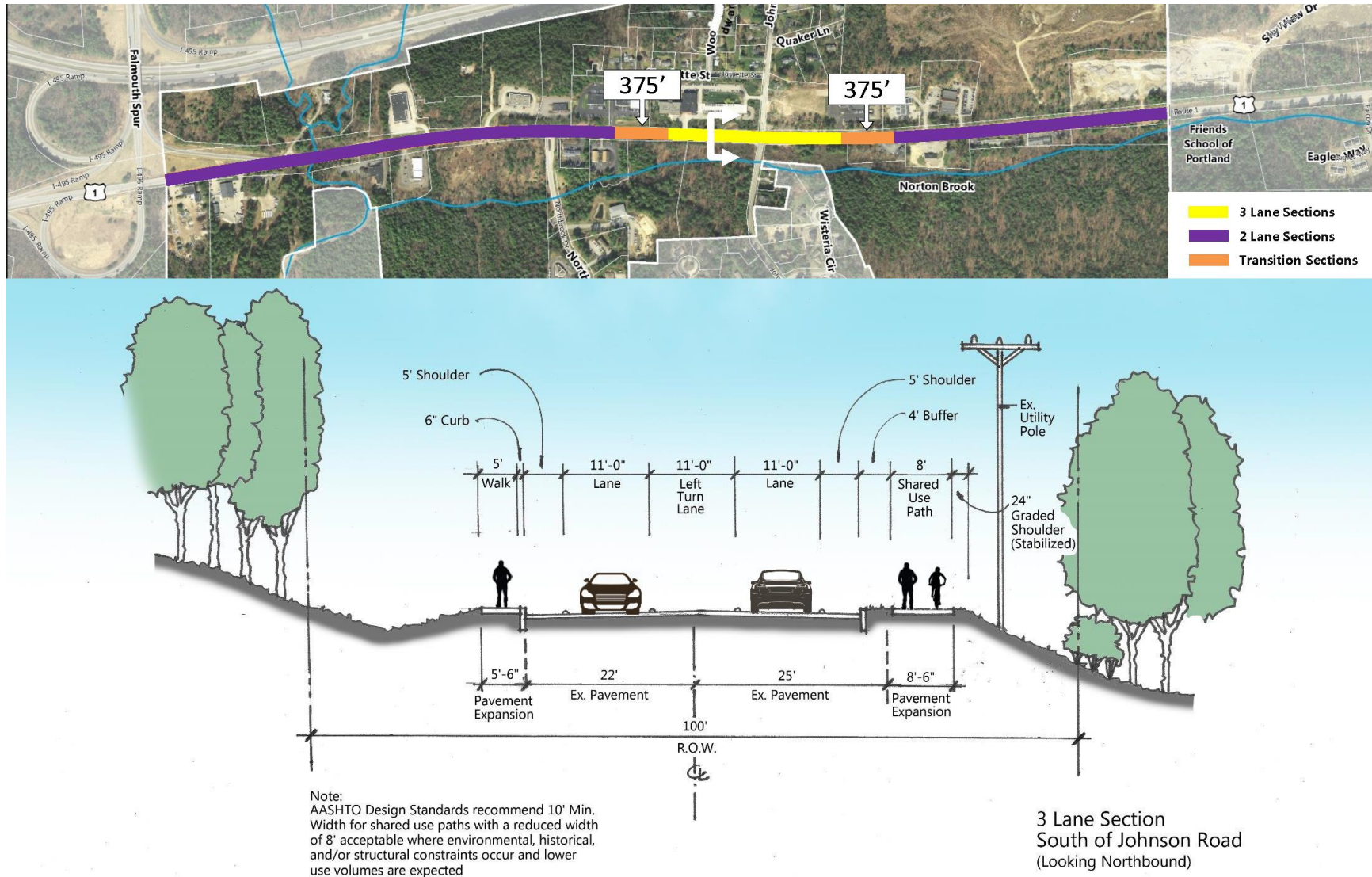
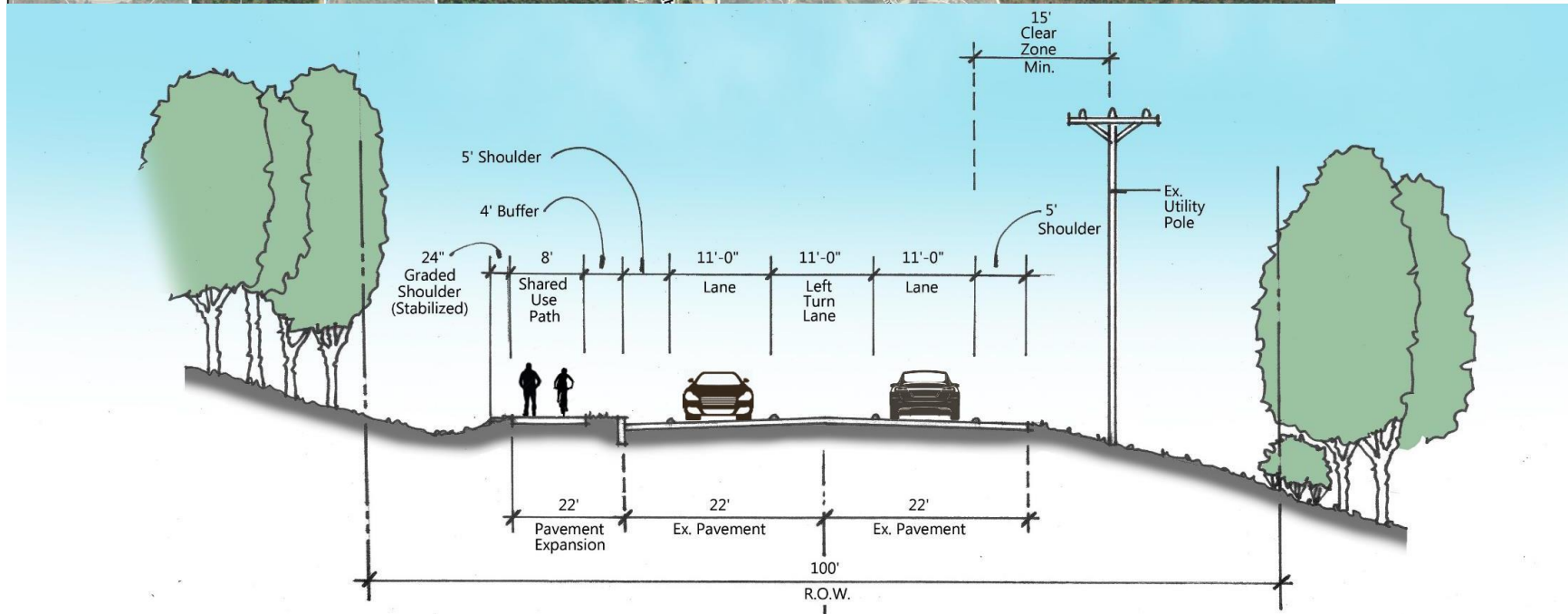


FIGURE 20 Study Area Route 1 Cross Section – 3 Lane Section north of Johnson Road



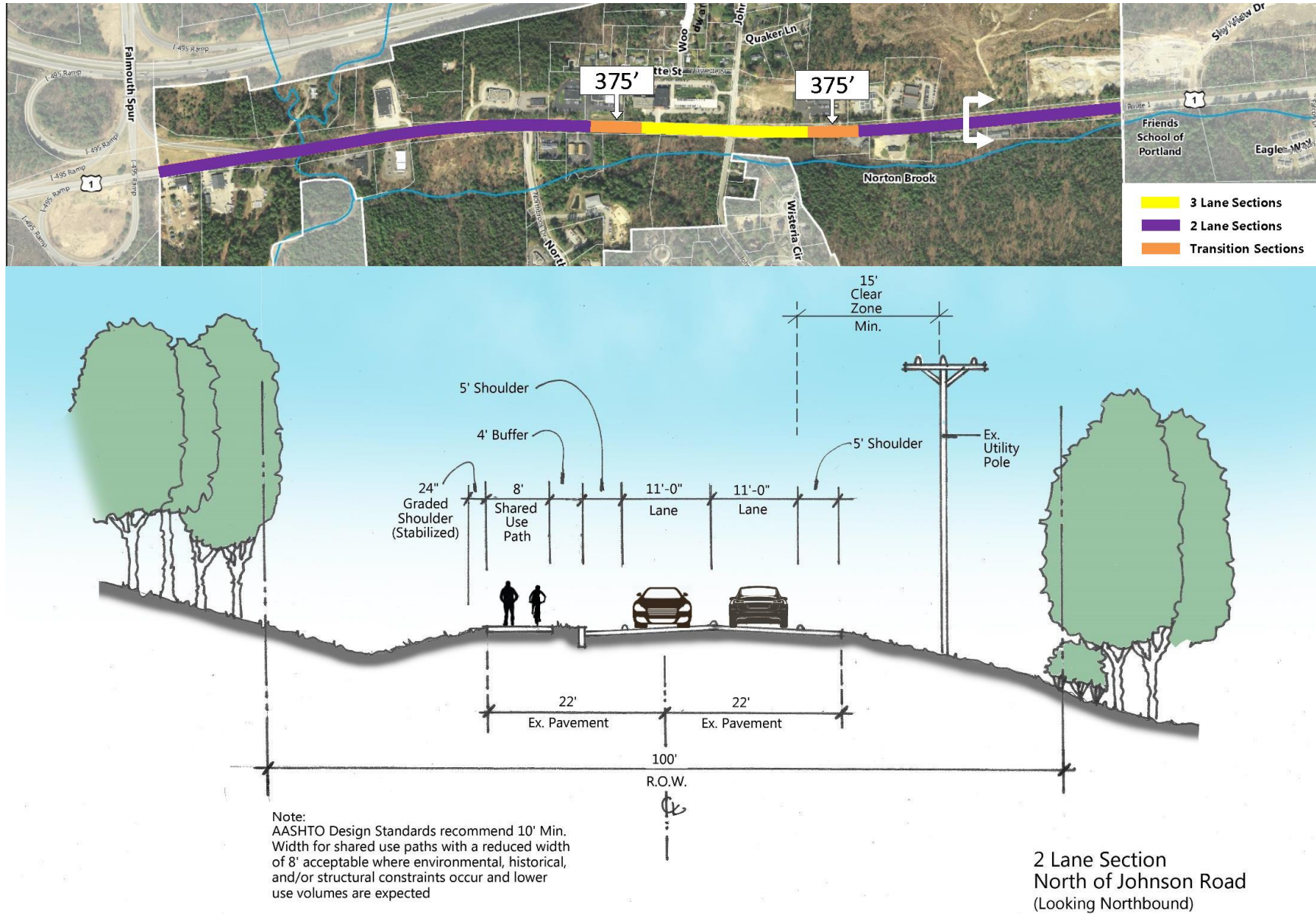
- 3 Lane Sections
- 2 Lane Sections
- Transition Sections



Note:
 AASHTO Design Standards recommend 10' Min. Width for shared use paths with a reduced width of 8' acceptable where environmental, historical, and/or structural constraints occur and lower use volumes are expected

3 Lane Section
 North of Johnson Road
 (Looking Northbound)

FIGURE 21 Study Area Route 1 Cross Section – 2 Lane Section north of Johnson Road



Recommendations

Land Use

Below is a list of land use recommendations illustrating the types of future uses that could occur in each of the major sites in these areas.

1. Continue to allow the current uses permitted in the Business and Professional District (BP) which includes business and professional offices and retail service.
2. Amend zoning ordinance to allow residential uses on the east side of Route One primarily east of Norton Brook and Sites 1 & 2 at the Falmouth Spur intersection at Route One. Develop Route One Residential Design Guidelines.
3. Amend zoning ordinance to allow neighborhood-oriented, small scale retail and restaurants on the east side of Route One primarily west of Norton Brook with frontage on Route One and the west side of Route One.
4. Amend zoning ordinance to permit Hotel use on the east side of Route One between the Spur and Mill Creek.
5. For site 5 the majority of the committee (5 of 8 members) supported continuing the existing Business Professional (BP) district. This district includes business and professional offices and retail service, while not allowing residential uses. It is important to note that a minority of the committee (3 of 8 members) advocated expanding the permitted use to include residential use.
6. On the west side of Route 1, the majority of the committee (5 of 8 members) recommended support for retail and restaurant uses only in association with primary Business Professional uses on each property.

Open Space, Recreation and Amenities

Below is a list of open space, recreation, and amenities recommendations illustrating the open space, recreation and amenities described in the three sub-districts.

1. Develop a Norton Brook Watershed Management Plan, including survey, stream condition analysis, opportunities for restoration, water quality improvements, trail routing, open space dedication.
2. Make trail improvements to connect trails at Nature Preserve and Underwood Park, and develop Norton Brook Trail.
3. Develop a strategic trail plan that incorporates existing trails, new trails, trail amenities, trail signage, parking and trail maps.
4. Review and modify Town Code of Ordinances to support the preservation of trees & open space, maintaining appropriate buffers and natural screening between uses, and provide site plan & landscape requirements in the BP District addressing the current and proposed permitted uses.

Mobility

Below is a list of mobility recommendations illustrating the mobility improvements described in the three sub-districts. These include Route 1 road improvements at Johnson Road, 5 feet wide bicycle lanes on both sides of Route 1, and a 8 feet wide multi-use path that connects from the Cumberland Town line to the Falmouth Spur.

1. Advance design development for the Route 1-Johnson Road intersection by including the following:
 - a. Dedicated turn lanes on Route 1

Route 1 North Vision

- b. Pedestrian cross walks
- c. New traffic signals and updated controls
2. Install sidewalk and shared use path and make bicycle lane improvements along Route 1
3. Install sidewalk on south side of Johnson Road from Route 1 to Middle Road
4. Make "Gateway" improvements such as landscaping, lighting and signage at north and south end of corridor and Johnson Road intersection
5. Work with METRO to make bus stop facility improvements, including evaluating transit routing/stops based on future development needs
6. Design streetscape improvements along Route 1 and Johnson Road, that will include, but not be limited, to street trees, roadway & pedestrian lighting and sidewalk connections to abutting areas

Update access management rules, where necessary, to minimize new curb cuts along Route One North and encourage/mandate shared access driveways.

Cost Estimate

Project Recommendations

#1 Route 1/Johnson Road Intersection – provide 11' wide northbound & southbound through lanes, designated 11' wide northbound & southbound left turn lanes onto Johnson Road, 5' wide shoulders (both sides of road), pedestrian/bicycle crossing improvements (striping & crossing signals), granite curbing adjacent to pedestrian walkways, striped medians at turn lane

transitions, 8' shared use path located on west side of Route 1 north of Johnson Road, 8' wide shared use path located on east side of Route 1 south of Johnson Road, 5' wide sidewalk located on west side of Route 1 south of Johnson Road, roadway and pedestrian lighting, street trees (see **Figures 16 & 17** and **Figures 19 & 20**)

#2 Route 1 Improvements – south of Route 1/Johnson Road intersection improvement project (project #1 above) – provide 11' wide northbound & southbound through lanes, 5' shoulder (both sides of road), granite curbing adjacent to pedestrian walkways, 8' wide shared use path located on east side of Route 1, 5' wide sidewalk located on west side of Route 1 (see **Figure 18**) - (project length = +/- 2,295 LF)

Four (4) Options for Route 1 Crossing over Mill Creek to accommodate the proposed two lane section with the 8' wide shared use path (east side Route 1) and 5' wide sidewalk (west side Route 1):

1. Build-up existing header and wing walls on east side of Route 1 & construct a MSE (mechanically stabilized earth) wall on west side of Route 1 = \$60,000
2. Construct a pedestrian bridge on east side of Route 1 & construct a MSE wall on west side of Route 1 = \$250,000
3. Construct a culvert extension to extend existing culvert to accommodate new road section = \$300,000
4. Construct a new, longer culvert to replace existing culvert to accommodate new road section = \$1,150,000

Route 1 North Vision

Note: Cost estimate for Option 4 assumes:

1. The proposed culvert is a 4-sided box culvert (as opposed to a 3-sided box culvert with footings)
2. The proposed culvert opening is the same size as the existing opening
3. The proposed culvert is approximately 130 LF long (a 9' increase over the existing length)
4. The proposed culvert will be constructed in two (2) phases with one lane of traffic maintained on Route 1 during construction

#3 Streetscape improvements (Route 1 south of Johnson Road) – provide roadway and pedestrian lighting, street trees, and sidewalk connections to adjacent developed properties south of the Route1/Johnson Road intersection project (project #1 above) – (project length = +/- 2,295 LF)

#4 Metro bus stop improvements – provide new bus shelters, seating, concrete pad, lighting, bike rack, and signage at two existing bus stop locations south of Johnson Road on Route 1.

#5 Sanitary Force Main upgrade – replace a +/- 1800 LF section of 4" PVC force main to 8" PVC to improve future function of existing sanitary sewer system along Route 1 North

#6 Route 1 Improvements - north of Route 1/Johnson Road intersection improvement project (project #1 above) – provide 11' wide northbound & southbound through lanes, 5' shoulder (both sides of road), granite curbing adjacent to pedestrian walkway, 8' wide shared use path located on west side of Route 1 (see **Figure 21**) - (project length = +/- 1,935 LF)

#7 Streetscape improvements (Route 1 north of Johnson Road) – provide roadway and pedestrian lighting, street trees, and

sidewalk connections to adjacent developed properties north of the Route 1/Johnson Road Intersection improvement project (project #1 above) – (project length = +/- 1,935 LF)

#8 Sidewalk on south side of Johnson Road from Route 1 to Middle Road – provide a 5' wide sidewalk from Route 1 to Middle Road & pedestrian at-grade railroad crossing to provide a pedestrian/bicycle connection to Route 1 North from the neighborhoods west of I-295. The Town's 2016 Bicycle & Pedestrian Plan shows the potential for future bicycle lanes on Middle Road. There is also the possibility a future pedestrian sidewalk could be added to Middle Road – (project length +/- 2,782 LF)

#9 Streetscape improvements (Johnson Road west of Route 1) – provide roadway and pedestrian lighting, and street trees - (project length +/- 2,782 LF)

#10 Gateways – Provide landscape & hardscape improvements at the north & south ends of the corridor and the Johnson Road/Route 1 intersection to signify the entrance into the Town of Falmouth at the Cumberland Town line, entrance into the Route 1 North area at the southern end, and the entrance into the neighborhoods east and west of Route 1 on Johnson Road. Improvements could include monument signage, low decorative walls, landscape lighting, specialty paving, and landscaping

#11 Develop Norton Brook Management Plan – prepare a topographic survey of the Shoreland Zone district area that straddles Norton Brook from the Cumberland town line south to its intersection with Mill Creek. Prepare a Watershed Management Plan that details strategies and recommendations for both watershed and stormwater management, water quality protection & improvement, stream enhancement opportunities,

Route 1 North Vision

identify locations where trail easements or trail licenses are needed on private property, parking location(s), and trail routing.

#12 Develop strategic trail plan – Prepare a strategic trail plan that inventories and maps existing trails and future trail development within the Route 1 North study area, conduct field observations, evaluate and prioritize trail projects, identify potential trail amenity locations, trail signage, parking and develop an overall trail map within the Route 1 North study area.

#13 Norton Brook Trail/Stream Restoration Improvements – construct the hiking trail along Norton Brook, stream restoration and water quality improvements, parking, trail amenities, trail signage as identified & designed in the Norton Brook Management Plan. (project length +/- 1.2 miles)

#14 Underwood Park Trail – construct a formal hiking trail connection from Underwood Park to the Falmouth Nature Preserve. Note: the route of this trail has already been largely established, trail easements or trail licenses need to be granted to the Town for sections that cross private property, adjustments to the final trail location may be needed based on property owner agreements and to improve its current condition. (project length = +/- 0.5 miles)

Cost Estimate Matrix

Location	#	Projects description	Cost	Notes
Route 1/Johnson Road Intersection	1	Design development & implementation (stand-alone)	\$ 2,140,000	
	2	Sidewalk and shared use path and bicycle lane improvements (+/- 2,295 LF)	\$ 1,727,000	1
Route 1 - South of Johnson Road	3	Streetscape improvements (street trees, lighting, sidewalk connections)	\$ 530,000	
	4	Metro bus stop improvements (2)	\$ 100,000	
	5	Sanitary force main upgrade (from 4" PVC pipe to 8" PVC pipe, 1,800 LF)	\$ 250,000	
Route 1 - North of Johnson Road	6	Sidewalk and shared use path and bicycle lane improvements (+/- 1,935 LF)	\$ 1,200,000	
	7	Streetscape improvements (street trees, lighting, sidewalk connections)	\$ 440,000	
Johnson Road	8	Sidewalk on south side from Route 1 to Middle Road (+/- 2,782 LF)	\$ 1,205,000	2
	9	Streetscape improvements (street trees, lighting, sidewalk connections)	\$ 650,000	
Gateways	10	Gateway improvements at north & south end of corridor and Johnson Road intersection	\$ 600,000	
	11	Develop Norton Brook Management Plan	\$ 80,000	
Trail Network/Norton Brook	12	Develop strategic trail plan	\$ 25,000	
	13	Norton Brook Trail/Stream Restoration improvements (+/- 1.2 miles)	\$ 350,000	
	14	Underwood Park Trail connection (+/- 0.5 miles)	\$ 40,000	
TOTAL CONCEPT COST			\$ 9,337,000	3

NOTES:

1. Estimate includes \$300,000 to cover Options 1, 2, or 3 for the Route 1 crossing over Mill Creek
2. Estimate excludes improvements to the Johnson Road bridge over I-295 (a bridge rehabilitation project is on MaineDOT's 2017-2019 Work Plan - suggest Town initiates dialogue with DOT with regards to pedestrian accommodations being included as part of that project)
3. Estimates include 10% design costs and 25% contingency

Next Steps

4

With the Vision Plan and recommendations established, the Town of Falmouth can move forward towards implementing the specific actions that are included in this Plan. While the recommendations are organized into Land Use, Mobility and Open Space, Recreation and Amenities, it will be important to think about the corridor as an integrated system of environments that collectively contribute toward its branding, aesthetics, and overall success. In addition to the specific recommendations included in the Chapter 3, below are a series of “next step” recommendations that cut across all sections.



Final presentation of the Route 1 North Vision Plan at the Public Meeting held in April 25, 2017

Next Steps

- ▶ **Advance the Interchange redevelopment project.** This will help set the stage for the character and development patterns at the southern gateway to the Route 1 North District
- ▶ **Develop a Preliminary Engineering Plan including a more detailed cost estimate** for the physical improvement actions that are included in this Plan.
- ▶ The Town should **take a proactive approach** towards economic development within the corridor.
- ▶ **Build public / private partnerships.** Achieving success is not only about the physical improvements, but is often about building partnerships and programming opportunities. For example, the trail network offers opportunities to build partnerships that may have additional benefits.

Appendix A – Zoning Excerpt of Residential A District
and Business Professional District

PART II CODE OF ORDINANCES

CH. II-19 ZONING AND FLOODPLAIN MANAGEMENT

FOOTNOTE(S):

--- (1) ---

Editor's note— The zoning, flood prevention and protection and site plan regulations of the town are not printed in this Code, but are on file in the town clerk's office.

Editor's note— At the city's instruction, Ord. of Sept. 24, 2007, Arts. I—XV, set out provisions intended for inclusion with Ch. II-19. For purposes of clarity, and at the editor's discretion, these provisions have been included as Art. II-19-2.

Cross reference— Boundaries of the town, § 2-2; provisions for notices for nuisances, signs, dangerous, unsafe, dilapidated buildings, and any other action the expense of which may be collected from the property owner, § 2-3; board of appeals, § 2-60 et seq.; parks and community programs advisory committee, § 2-85 et seq.; planning board, § 2-95 et seq.; waterfront and harbor committee, § 2-115 et seq.; division of planning, § 2-246; division of code administration functions, § 2-248; animals, Ch. II-3; buildings and building regulations, Ch. II-4; condominium conversion regulations, § 4-100 et seq.; land subdivision, Ch. II-7; licenses, permits and business regulations, Ch. II-8; marine activities, structures and ways, Ch. II-9; junked and abandoned motor vehicles prohibited on public and private property, § 12-3; solid waste regulations, Ch. II-13; swimming pools, Ch. II-15; traffic and motor vehicles, Ch. II-17; utilities, Ch. II-18; certain discharges into the public sewer system prohibited, § 18-190 et seq.

ART. II-19-1. IN GENERAL

Div. II-19-1-3. ESTABLISHMENT OF DISTRICTS

Sec. 19-12 Business and Professional District (BP)

To establish within the Town of Falmouth space for business and professional offices, with exceptions for certain other uses with appropriate site design. Uses locating in this District shall be located, sited and landscaped in such a manner as to preserve open space, control vehicle access and traffic, maintain appropriate setbacks, buffers and natural screening, and to screen parking areas from Route One and other roadways.

FALMOUTH

TOWN CHARTER AND CODE OF ORDINANCES

<p>Permitted Structures and Uses Business and professional offices Retail Service Tier I Personal Wireless Service Facilities [Adopted, 4/25/05] Tier II Personal Wireless Service Facilities [Adopted, 4/25/05] Essential Services** [Adopted, 7/28/2014]</p>	<p>Conditional Uses Light manufacturing operations Laboratory facilities Private clubs Research facilities Warehouses and wholesale distributors not exceeding 30,000 SF in gross floor area and not having more than two off-street loading berths. Hotels and motels, but only on the westerly side of U.S. Route One in the area between Bucknam Road and Johnson Road. Churches [Amended, 7/22/91] Outdoor Eating Areas [Adopted, 5/28/96] Day Care Centers [Adopted, 7/23/01] Ballet Arts Facilities [Adopted 5/24/04] Commercial Schools not exceeding 2,000 square feet of net leasable area. [Adopted 5/27/08]</p>
<p>**[Note: establishment of an essential service that includes vehicular access or structures requires site plan approval by the Planning Board.]</p>	

Minimum Lot Size		Maximum Impervious Surface	Minimum Setbacks (ft)		
Lot Area (sq ft)	Lot Width (ft)		Front	Side	Rear
40,000	200	50%	80	25	50

Min. setback between parking areas and roadways (ft)	Min. setback where residential district abuts (ft)	Max. height of structures (ft)	Min. distance between buildings at closest point
40	75	39	25

Effective on: 12/9/2013

Sec. 19-8 "RA" - Residential A District [Amended 7/11/16]

Permitted Structures and Uses	Conditional Uses
Accessory Building & Uses Accessory Dwelling Unit Farming Forestry Municipal Buildings & Uses Single Family Detached Dwellings Two family Multi family Tier I Personal Wireless Service Facilities [Adopted, 4/25/05] Essential Services** [Adopted, 7/28/2014]	Cemeteries Day Care Centers [Amended, 7/22/91] Day Care Homes [Amended, 7/22/91] Churches Congregate Housing Health Institutions. Home Occupations Libraries Marinas Museums Private Clubs Private Schools Amateur Radio Towers [Adopted, 4/23/90] Bed and Breakfast Establishments [Adopted,5/27/93] Elderly Boarding Home [Adopted, 5/28/96] Outdoor Eating Areas [Adopted, 5/28/96] Roadside Stand [Adopted 02/27/12]
**[Note: establishment of an essential service that includes vehicular access or structures requires site plan approval by the Planning Board.]	

	Minimum Lot Size		Max. Lot Coverage	dwelling unit density allowance (sq ft per unit)	Min. site size (acres)
	Lot Area (sq ft)	Lot Width (ft)			
All Uses	--	--	20%	--	--
Cemeteries	--	300	--	--	10
Day Care Centers	--	200	--	--	2
Churches	--	300	--	--	5
Congregate Housing	--	300	--	7,500	5
Health Institute	--	300	--	--	5
Multi family	15,000	100	--	5,000	-
Private Clubs	--	200	--	--	3
Private Schools	--	200	--	--	3
Two-family	10,000	50	--	5,000	--
Single Family Detached & Other Uses	10,000	50	--	10,000	--

Minimum Setbacks In Feet			
	Front Setback	Side Setback	Rear Setback
Cemeteries	50	50	50
Day Care Centers	50	50	50
Churches	100	100	100
Congregate Housing	100	100	100
Health Institute	100	100	100
Private Clubs	50	50	50
Private Schools	50	50	50
Single Family, Detached/Two family/Multi family and Other Uses	10	10	30

Appendix B – RKG Route 1 North Vision Plan
Market Indicators Memorandum

DRAFT MEMORANDUM

TO: David Woodward, VHB
FROM: Craig Seymour
DATE: January 6, 2017
SUBJECT: Route 1 North Vision Plan
Market Indicators

Pursuant to our scope of services to assist VHB with a vision plan for the Town of Falmouth, I offer the following summary findings and observations regarding the current market for office and professional uses, among others, that might be accommodated in the Study Area. RKG's assessment included a review of existing market trend data, analysis of key economic trends, discussions with knowledgeable individuals and an evaluation of development requirements.

- The Route 1 North corridor in Falmouth has seen relatively steady development growth over the past several years, with a variety of smaller office, service, retail and light industrial users. Most properties are single-user facilities with the exception of a few condominium buildings. Many are believed to be owner-occupied although some are leased to end users. With the exception of two or three parcels on the east side of Route 1 and one on the west side, the remaining developable land is limited to in-fill expansion. Topographic and environmental constraints also exist.
- Falmouth is part of a large suburban marketplace surrounding Portland, and is combined with Yarmouth and Cumberland as a separate submarket for regional reporting purposes. The approximately 900,000 square feet of office space in the submarket represents 8 percent of the regional total of 11.8 million square feet.
- Region-wide, there is limited growth in demand for office and flex space based on employment forecasts to 2025, estimated at approximately 27,000 square feet annually. Another 15,600 square feet of commercial space (retail, arts & entertainment, accommodations/food service, public administration) is forecast along with 42,500 square feet in the health care/social assistance sector. However, there is also substantial turnover of space, as businesses grow or decline, or move from one location to another.
- Approximately 33,000 square feet of office in nine properties (and 78,000 square feet of retail in 2 properties) is available for lease in Falmouth. Based on Falmouth's historic capture rate and forecast of 1,500 square feet of annual demand for office space, this represents several years of supply.

- Falmouth is seen by the market as a secondary location, compared to downtown Portland and the Maine Mall area, although it is relatively well located from an accessibility perspective. Rents in Falmouth (and other suburban sub-markets) are significantly lower than in downtown Portland.
- Traffic counts on Route 1 North (at 8,000 to 10,000 vpd) are below the range considered acceptable by major national retailers.
- Most existing businesses in the Route 1 North corridor are owner-occupied or end users who may not need highway exposure or are price sensitive.
- There is increasing evidence of office users leaving downtown Portland (due in large part to increasing rents and/or parking costs) and moving to suburban locations and either retrofitting existing spaces or building new. This is apparent among some professional firms (law, accounting, engineering, medical services) with a client and/or employee base that is more regionally focused.
- Economic rents cannot support the costs to develop and build speculative office space in the study area at this time. Build-to-suit deals (owner occupant) are possible, but such deals may be based on non-economic benefits.
- Planned development of the MaineDOT surplus land directly off the I-95 spur (and just outside the Route 1 North study area) may absorb much of the demand for office over the next few years, but will also help better establish the corridor as a “location” within the greater Portland market.
- Similarly, redevelopment of the Route 1 South commercial and retail corridor with higher density, mixed-use development, will also bring greater visibility to Falmouth and act to spur demand, increasing the area’s share of regional growth.
- Multifamily residential uses in the corridor (both south and north) could act to spur demand for retail and office, if designed to create a live-work-play environment.

The attached Appendix summarizes RKG’s market assessment findings and conclusions.

I. APPENDIX

A. Socioeconomic Indicators

The following presents selected demographic and economic metrics for Falmouth, Maine; Cumberland County, Maine; and the Portland, Maine MSA. The purpose is to provide an overview of existing and projected characteristics that influence real estate market conditions in order to assist in understanding the market opportunities for repositioning and enhancing economic development opportunities along the Route 1 corridor as it traverses from the spur with Interstate-495 (paralleling Interstate-295) and north to the town line (refer to Figure 1).¹

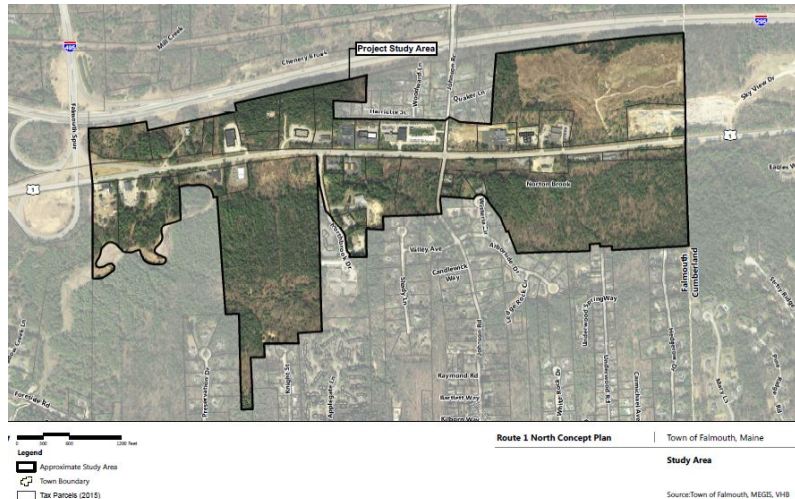


Figure 1 – Falmouth, ME Route 1 Corridor Study Area

The study area (refer to Table 1) is comprised of slightly less than 300 acres with 62 percent classified as land (by use type), followed by nearly 20 percent in office use (which accounts for one-third of the total 83 properties). The assessed value in the corridor is nearly \$55.5 million with 60 percent of the value as office use. Residential uses also comprise a third of the properties but less than eight percent of the land area and 14 percent of the assessed value. Retail uses account for less than four percent of the corridor’s assessed value.²

Table 1 – Route 1 Corridor Study Area Metrics

Property Type	Property Count	% of Total	Acreage	% of Total	Assessed Value	% of Total
Residential	27	32.5%	22.99	7.7%	\$ 7,672,100	13.8%
Office	28	33.7%	57.96	19.5%	\$33,112,600	59.7%
Industrial/Whse	10	12.0%	7.05	2.4%	\$ 1,545,000	2.8%
Institutional	2	2.4%	8.36	2.8%	\$ 8,193,900	14.8%
Retail	3	3.6%	16.64	5.6%	\$ 2,017,600	3.6%
Land	13	15.7%	184.25	62.0%	\$ 2,929,700	5.3%
TOTAL	83	100.0%	297.24	100.0%	\$55,470,900	100.0%

Source : VHB and RKG Associates, Inc. (2016)

¹ The full name of the metropolitan area is the Portland-South Portland-Biddeford, ME MSA (metropolitan statistical area), which is comprised of Cumberland, Sagadahoc and York Counties. The MSA is a part of the broader Portland-Lewiston-South Portland CSA (combined statistical area). Throughout this narrative the MSA is referenced to as the Portland MSA for convenience to the reader.

² Throughout much of this narrative the data is discussed in rounded numbers for ease to the reader. Information in tabular format is presented unrounded.

1. Population

The total population of Falmouth increased by slightly more than seven percent from 2000 to 2010, or by 760 persons (Table 2). This rate of growth exceeds the approximate six percent growth in the county and the 5.5 percent growth for the MSA. The 2016 to 2021 projected population growth for Falmouth is more modest at 3.6 percent but still surpasses that for the county and the MSA.

All three areas have, and are projected to continue, to realize an increase in the population aged 65 and over, reflecting an increase in residents entering retirement years and possibly desirous of downsizing their residences or potentially seeking assisted living or continuum of care facilities. Conversely, all three areas witnessed a decline in their population aged 25 to 45 years from 2000 to 2010. Persons in this cohort are typically considered to be in their family formation and home buying years. While modest population gains in this cohort are projected for the county and the MSA from 2016 to 2021, a continued decline of this cohort is projected for Falmouth. As a result, the median age of the Falmouth population is well above that for either the county or the MSA and the disparity is projected to widen.

Table 2 – Selected Population Metrics

Selected Summary							
Demographics	Census	Census	Change		Estimated	Projected	% Δ 2016
Population	2000	2010	#	%	2016	2021	to 2021
FALMOUTH, ME							
Total Population	10,425	11,185	760	7.3%	11,573	11,985	3.6%
Population > 65 years	1,668	1,878	210	12.6%	2,201	2,644	20.1%
Population 25 to 44 years	2,866	2,160	(706)	-24.6%	1,892	1,818	-3.9%
Median Age	40.8	45.2	4.4	10.9%	47.4	49.0	3.4%
CUMBERLAND COUNTY, ME							
Total Population	265,481	281,675	16,194	6.1%	288,393	297,968	3.3%
Population > 65 years	35,491	40,157	4,666	13.1%	47,121	54,950	16.6%
Population 25 to 44 years	82,956	73,064	(9,892)	-11.9%	72,958	74,850	2.6%
Median Age	37.6	41.0	3.4	9.1%	42.1	42.8	1.6%
PORTLAND, ME MSA							
Total Population	487,480	514,097	26,617	5.5%	525,611	542,953	3.3%
Population > 65 years	65,361	76,298	10,937	16.7%	90,115	105,310	16.9%
Population 25 to 44 years	149,646	128,410	(21,236)	-14.2%	127,730	130,776	2.4%
Median Age	38.0	42.0	4.0	10.6%	43.3	44.0	1.7%
Falmouth as % of County							
Total Population	3.93%	3.97%	0.0004	1.1%	4.01%	4.02%	0.2%
Population > 65 years	4.70%	4.68%	(0.0002)	-0.5%	4.67%	4.81%	3.0%
Population 25 to 44 years	3.45%	2.96%	(0.0050)	-14.4%	2.59%	2.43%	-6.3%
Median Age	108.51%	110.26%	0.0175	1.6%	112.53%	114.48%	1.7%
Falmouth as % of MSA							
Total Population	2.14%	2.18%	0.0004	1.7%	2.20%	2.21%	0.3%
Population > 65 years	2.55%	2.46%	(0.0009)	-3.5%	2.44%	2.51%	2.8%
Population 25 to 44 years	1.92%	1.68%	(0.0023)	-12.2%	1.48%	1.39%	-6.1%
Median Age	107.37%	107.66%	0.0029	0.3%	109.59%	111.46%	1.7%

Source: US Census; Alteryx & RKG Associates, Inc.

- Conclusions** – For Falmouth, while this aging in place of the population may reflect a continued growth in disposable income among the elderly, when coupled with the declining population of the 25 to 44 cohort, it may also indicate a decline in the population in their

peak spending years resulting from new families, household formations and the presence of children.

2. Housing and Households

Since 2000 and projected for 2021 both the total housing units in Falmouth, as well as the households (e.g., occupied housing units) have increased (Table 3). This is also the case for the county and the MSA. Home ownership in Falmouth exceeds 80 percent which is well above the nation average of 60 to 65 percent and above the home ownership rates for both the county and the MSA, across all years. The comparative rates of growth for housing and households, as well as the projected growth, are fairly similar across all three areas, with Falmouth accounting for three to four percent of housing and households in Cumberland County and two percent or slightly less for the MSA. This disparity in home ownership rates is partially reflected in the higher average household sizes for Falmouth when contrasted to the county and the MSA. All three areas experienced an increase in the number of vacant housing units between 2000 and 2010, ranging from 8.8 percent for Falmouth (2010) to 18.8 percent for the MSA (2010). All three areas are also projected to realize an increase in the number of vacant housing units through 2021, with the Falmouth rate at 7.7 percent (2021), the county at 14.6 percent (2021) and the MSA at 18.2 percent (2021). While these vacancies partially reflect changes in the population and its component cohorts, they are likely more representative of seasonal and/or second homes.

Table 3 – Selected Housing Metrics

Selected Summary									
Demographics	Census	Census	Change		% of Total Units		Estimated	Projected	% Δ 2016
Housing/Households	2000	2010	#	%	2000	2010	2016	2021	to 2021
FALMOUTH, ME									
Total Housing Units	4,229	4,751	522	12.3%	100.0%	100.0%	4,871	5,068	4.0%
Occupied Units	4,001	4,334	333	8.3%	94.6%	91.2%	4,505	4,676	3.8%
Owner Households (<i>% of Occ</i>)	3,309	3,552	243	7.3%	82.7%	82.0%	3,665	3,805	3.8%
Renter Households (<i>% of Occ</i>)	692	782	90	13.0%	17.3%	18.0%	840	871	3.7%
Vacant Units	228	417	189	82.9%	5.4%	8.8%	366	392	7.1%
Average HH Size	2.55	2.54	(0.01)	-0.4%			2.53	2.52	-0.4%
CUMBERLAND COUNTY, ME									
Total Housing Units	122,548	138,657	16,109	13.1%	100.0%	100.0%	140,293	146,523	4.4%
Occupied Units	107,944	117,339	9,395	8.7%	88.1%	84.6%	120,415	125,188	4.0%
Owner Households (<i>% of Occ</i>)	72,063	78,545	6,482	9.0%	66.8%	66.9%	80,287	83,841	4.4%
Renter Household (<i>% of Occ</i>)	35,881	38,794	2,913	8.1%	33.2%	33.1%	40,128	41,347	3.0%
Vacant Units	14,604	21,319	6,715	46.0%	11.9%	15.4%	19,879	21,335	7.3%
Average HH Size	2.38	2.32	(0.06)	-2.5%			2.31	2.30	-0.4%
PORTLAND, ME MSA									
Total Housing Units	233,289	262,719	29,430	12.6%	100.0%	100.0%	266,197	277,646	4.3%
Occupied Units	196,642	213,436	16,794	8.5%	84.3%	81.2%	218,423	227,027	3.9%
Owner Households (<i>% of Occ</i>)	136,477	149,343	12,866	9.4%	69.4%	70.0%	152,118	158,703	4.3%
Renter Household (<i>% of Occ</i>)	60,165	64,093	3,928	6.5%	30.6%	30.0%	66,305	68,324	3.0%
Vacant Units	36,648	49,283	12,635	34.5%	15.7%	18.8%	47,774	50,619	6.0%
Average HH Size	2.42	2.35	(0.07)	-2.9%			2.34	2.33	-0.4%
Falmouth as % of County									
Total Housing Units	3.45%	3.43%	(0.0002)	-0.7%	100.0%	100.0%	3.47%	3.46%	-0.4%
Occupied Units	3.71%	3.69%	(0.0001)	-0.4%	107.4%	107.8%	3.74%	3.74%	-0.2%
Owner Households (<i>% of Occ</i>)	4.59%	4.52%	(0.0007)	-1.5%	123.9%	122.4%	4.56%	4.54%	-0.6%
Renter Household (<i>% of Occ</i>)	1.93%	2.02%	0.0009	4.5%	52.0%	54.6%	2.09%	2.11%	0.6%
Vacant Units	1.56%	1.96%	0.0039	25.3%	45.2%	57.1%	1.84%	1.84%	-0.2%
Average HH Size	107.14%	109.48%	0.0234	2.2%			109.52%	109.57%	0.0%
Falmouth as % of MSA									
Total Housing Units	1.81%	1.81%	(0.0000)	-0.2%	100.0%	100.0%	1.83%	1.83%	-0.2%
Occupied Units	2.03%	2.03%	(0.0000)	-0.2%	59.0%	59.3%	2.06%	2.06%	-0.1%
Owner Households (<i>% of Occ</i>)	2.42%	2.38%	(0.0005)	-1.9%	119.2%	117.1%	2.41%	2.40%	-0.5%
Renter Household (<i>% of Occ</i>)	1.15%	1.22%	0.0007	6.1%	56.5%	60.1%	1.27%	1.27%	0.6%
Vacant Units	0.62%	0.85%	0.0022	36.0%	18.0%	24.7%	0.77%	0.77%	1.1%
Average HH Size	105.37%	108.09%	0.0271	2.6%			108.12%	108.15%	0.0%

Source: US Census; Alteryx & RKG Associates, Inc.

- **Conclusions** – Home ownership predominates in Falmouth, across all years, when compared with the county and the MSA, although all areas are projected to realize an increase in the number of vacant housing units.

3. Income

The median household income for all three areas has increased since 2000 and is projected to continue to increase through 2021 (Table 4). However, from 2000 to 2010 the growth in median household income for all three areas fell just shy of the estimated inflation of 26.6 percent, indicating that there was no real growth in income. The near 25 percent growth for Falmouth was the nearest to the inflation rate. Nonetheless, the median household income for Falmouth, across all years, is well above that for either the county or the MSA. The number of households earning less than \$50,000 declined for all areas from 2000 to 2010 and projected to continue to do so for the 2016 to 2021 timeframe. Only Falmouth experienced a decline in households earning \$50,000 to \$100,000 during the last census decade and is also the only locality projected to continue to do so. Conversely, all areas witnessed and projected to continue to witness growth in the number of households earning more than \$100,000.

Table 4 – Selected Income Metrics

Selected Summary									
Demographics	Census	Census	Change		% of Total Units		Estimated	Projected	% Δ 2016
Income	2000	2010	#	%	2000	2010	2016	2021	to 2021
FALMOUTH, ME									
Households by Income									
earning less than \$50,000	1,429	1,295	(134)	-9.4%	35.7%	29.9%	1,154	945	-18.1%
earning \$50,000 - \$100,000	1,289	1,230	(59)	-4.6%	32.2%	28.4%	1,185	1,110	-6.3%
earning more than \$100,000	1,295	1,809	514	39.7%	32.4%	41.7%	2,166	2,621	21.0%
Median Household Income	\$66,342	\$82,839	\$16,497	24.9%	(inflation 26.6%)		\$95,958	\$109,911	14.5%
CUMBERLAND COUNTY, ME									
Households by Income									
earning less than \$50,000	60,662	55,676	(4,986)	-8.2%	56.2%	47.4%	51,500	45,566	-11.5%
earning \$50,000 - \$100,000	34,647	37,377	2,730	7.9%	32.1%	31.9%	38,837	38,990	0.4%
earning more than \$100,000	12,658	24,286	11,628	91.9%	11.7%	20.7%	30,078	40,632	35.1%
Median Household Income	\$44,092	\$52,830	\$8,738	19.8%	(inflation 26.6%)		\$59,369	\$72,038	21.3%
PORTLAND, ME MSA									
Households by Income									
earning less than \$50,000	111,732	99,515	(12,217)	-10.9%	56.8%	46.6%	92,520	81,473	-11.9%
earning \$50,000 - \$100,000	64,678	72,599	7,921	12.2%	32.9%	34.0%	75,092	75,753	0.9%
earning more than \$100,000	20,265	41,322	21,057	103.9%	10.3%	19.4%	50,811	69,801	37.4%
Median Household Income	\$43,845	\$53,693	\$9,848	22.5%	(inflation 26.6%)		\$59,515	\$71,574	20.3%
Falmouth as % of County									
Households by Income									
earning less than \$50,000	2.36%	2.33%	(0.0003)	-1.3%	63.6%	63.0%	2.24%	2.07%	-7.4%
earning \$50,000 - \$100,000	3.72%	3.29%	(0.0043)	-11.5%	100.4%	89.1%	3.05%	2.85%	-6.7%
earning more than \$100,000	10.23%	7.45%	(0.0278)	-27.2%	276.0%	201.7%	7.20%	6.45%	-10.4%
Median Household Income	150.46%	156.80%	0.0634	4.2%	(inflation 26.6%)		161.63%	152.57%	-5.6%
Falmouth as % of MSA									
Households by Income									
earning less than \$50,000	1.28%	1.30%	0.0002	1.7%	62.9%	64.1%	1.25%	1.16%	-7.0%
earning \$50,000 - \$100,000	1.99%	1.69%	(0.0030)	-15.0%	97.9%	83.4%	1.58%	1.47%	-7.1%
earning more than \$100,000	6.39%	4.38%	(0.0201)	-31.5%	314.1%	215.6%	4.26%	3.75%	-11.9%
Median Household Income	151.31%	154.28%	0.0297	2.0%	(inflation 26.6%)		161.23%	153.56%	-4.8%

Source: US Census; Alteryx & RKG Associates, Inc.

- **Conclusions** – Typically, growth in household incomes is often associated with increases in consumer spending demand. Considering the growth of the population aged 65 and older in Falmouth (typically those with higher disposable incomes), in conjunction with higher median household incomes in total, the demand for convenient and local stores and services may increase in Falmouth and may present some opportunities for development along the Route 1 corridor.

4. Economic Indicators

Total employment in Cumberland County increased by more than 8,000 between 2010 and 2015 (refer to Table 8) representing a five percent growth. The only employment sectors to experience losses was among information services (25 percent) and the financial sector (nominal at 0.3 percent). The number of businesses increased by 11.5 percent and totaled 13,400 in 2015. The average annual wage rose by nearly 13 percent from \$42,150 in 2010 to \$47,500 in 2015. This total increase in wages surpasses the estimated nine percent rate of inflation over the same timeframe. However, not all sectors experienced real growth in wages including manufacturing, transportation/warehousing, information services and administrative services. Additional observations include the following:

- Despite employment gains, the representation of employees as a percent of the county total, declined in retail trade and real estate, as well as information and financial services.
- In 2015, health care services accounted for 18.4 percent of the employment (an increase over 2010) and the average wage was 103 percent of the county average.
- Conversely, retail employment accounted for 12.5 percent (a decline) and wages represented 58 percent of the county average.
- In 2015, the highest wages (relative to the county) were in financial services and professional services.

Table 5 – Selected Economic Metrics – Cumberland County, ME

Selected Economic Indicators - 2010 - 2015	CUMBERLAND COUNTY, ME								
	2010 Employment	2010 Avg Annual \$	2010 Businesses	2015 Employment	2015 Avg Annual \$	2015 Businesses	% Δ Employment	% Δ Avg Annual \$	% Δ Businesses
Total, All Industries	167,365	\$42,146	12,013	175,732	\$47,505	13,400	5.0%	12.7%	11.5%
23 - Construction	6,915	\$44,094	1,227	7,542	\$49,669	1,231	9.1%	12.6%	0.3%
31-33 - Manufacturing	9,251	\$57,708	370	9,827	\$60,468	405	6.2%	4.8%	9.5%
42 - Wholesale Trade	6,699	\$54,495	808	7,532	\$64,535	987	12.4%	18.4%	22.2%
44-45 - Retail Trade	21,803	\$24,992	1,396	22,028	\$27,702	1,413	1.0%	10.8%	1.2%
48-49 - Transportation and Warehousing	5,403	\$38,075	260	5,584	\$41,433	261	3.3%	8.8%	0.4%
51 - Information	3,838	\$52,924	190	2,871	\$53,944	255	-25.2%	1.9%	34.2%
52 - Finance and Insurance	11,331	\$68,528	699	11,292	\$79,118	736	-0.3%	15.5%	5.3%
53 - Real Estate and Rental and Leasing	2,796	\$37,413	518	2,849	\$45,574	568	1.9%	21.8%	9.7%
54 - Professional and Technical Services	9,619	\$62,715	1,747	10,568	\$77,889	2,129	9.9%	24.2%	21.9%
56 - Administrative and Waste Services	9,092	\$37,657	719	9,886	\$38,827	834	8.7%	3.1%	16.0%
62 - Health Care and Social Assistance	29,836	\$43,599	1,222	32,316	\$49,005	1,278	8.3%	12.4%	4.6%
71 - Arts, Entertainment, and Recreation	2,426	\$22,749	200	2,553	\$25,968	234	5.2%	14.2%	17.0%
72 - Accommodation and Food Services	15,117	\$16,784	913	16,598	\$19,980	1,025	9.8%	19.0%	12.3%
81 - Other Services, Ex. Public Admin	4,852	\$28,558	1,003	5,501	\$32,537	1,168	13.4%	13.9%	16.5%

Source : US Census Bureau, Maine Center for Workforce Research and Information and RKG Associates, Inc. (2016)

- **Conclusions** – On average the distribution of businesses, employment (and accompanying wages) in Cumberland County realized growth between 2010 and 2015, with the exceptions previously noted.

5. Projected Employment and Space Needs

RKG next considered the projected demand for additional development, or more appropriately, square footage (SF) needs, across Cumberland County. RKG applied the statewide projected employment growth rates by selected industry sector, as presented by the Maine Center for Workforce Research and Information, to Cumberland County employment levels in 2015 (assuming the most populous county performs similar to the state). These employment projections (2025) were converted into estimates of space utilizing industry standards for the average SF per employee by specific industry sector. The estimated SF demands reflect the change in employment from 2015 to 2025 on an annual basis use (refer to Table 6). RKG cautions that the projected demand for additional SF does not necessarily equate to a demand for newly built SF. Typically, much of the demand may be accommodated by existing vacancies in the market area or by a better utilization of existing space.

Table 6 – Projected Employment and Space Needs – Cumberland County, ME

Estimated Employment and SF Needs by Selected Industry Sector	CUMBERLAND County, ME			
	Avg/SF per Emp	2025 Employ	Change from 2015	Est. Gross Annual Demand - SF
OFFICE/FLEX				
Information	175	2,604	(267)	(4,669)
Finance/Insurance	200	11,227	(65)	(1,290)
Real Estate	200	2,901	52	1,039
Professional/Technical	175	11,173	605	10,584
Administration/Waste Services	200	10,959	1,073	21,456
Subtotal		38,864	1,398	27,120
INSTITUTIONAL				
Health Care/Social Assistance	150	35,147	2,831	42,460
Subtotal		35,147	2,831	42,460
COMMERCIAL				
Arts and Entertainment	150	2,651	98	1,465
Retail Trade	175	22,114	86	1,496
Accommodations/Food Services	175	17,243	645	11,285
Other exc. Public Administration	150	5,590	89	1,332
Subtotal		47,597	917	15,578
INDUSTRIAL				
Construction	150	7,607	65	979
Manufacturing	1,000	8,557	(1,270)	(126,999)
Wholesale Trade	750	7,313	(219)	(16,458)
Transportation/Warehousing	1,000	5,597	13	1,289
Subtotal		29,074	(1,411)	(141,190)
TOTAL		150,681	3,734	(56,032)

Source : US Census Bureau, Maine Center for Workforce Research and Information and RKG Associates, Inc. (2016)

Across all industry sectors there is a projected decline of SF needs; however, this is heavily influenced by projected losses of employment in the manufacturing sector, which could also indicate an inventory of pending vacancies or at a minimum properties available for reuse and repositioning. Excluding the industrial uses, employment gains across other sectors, notable office and institutional, may present opportunities for additional development across the county and in Falmouth along the Route 1 corridor. The appropriateness of any particular site along the corridor is a matter of additional research and would be influenced by specific tenant and/or end-user needs. However, future demand is projected.

6. Commuting

In 2010 there were 5,231 workers residing in Falmouth (Table 7) and approximately 19 percent of those (1,001) also worked in Falmouth. However, Portland was the workplace of 41 percent of the Falmouth resident workers, or nearly 2,150 persons. All combined, 62 percent of the Falmouth resident workers commuted to six nearby communities for employment. The remaining 18.5 percent were spread across the state and the region including 51 commuters to Boston. In 2010 there were 5,770 jobs in Falmouth and approximately 17 percent (1,001) were held by Falmouth residents. Slightly more workers, at nearly 19 percent, commuted from Portland to Falmouth for their place of work. In total, nearly 43 percent of the workers in Falmouth commuted from nearby locations. The remaining 40 percent of the workers were distributed across the state and the region including 61 from New Hampshire (mostly Portsmouth and Somersworth). Overall, Falmouth was a net importer of employment by 540 workers or about 10 percent of the resident workforce of 5,231.

Table 7 – Commuting Metrics 2010 – Falmouth, ME

WORKERS IN RESIDENCE & PLACE WHERE THEY WORK				JOBS IN PLACE & PLACE WHERE WORKERS RESIDE					
Workers in Residence	#	Workplace of Falmouth, ME - Working Residents	#	% of Residents	Local Jobs	#	Jobs in Falmouth, ME - Held by Workers from	#	% of Jobs
Falmouth, ME	5,231	Falmouth town	1,001	19.1%	Falmouth, ME	5,770	Falmouth, ME	1,001	17.3%
		Top Tier	3,260	62.3%			Top Tier	2,476	42.9%
		Portland city	2,144	41.0%			Portland city	1,079	18.7%
		South Portland city	439	8.4%			Cumberland town	457	7.9%
		Scarborough town	212	4.1%			Westbrook city	293	5.1%
		Westbrook city	172	3.3%			Windham town	288	5.0%
		Freeport town	149	2.8%			South Portland city	193	3.3%
		Yarmouth town	144	2.8%			New Gloucester town	166	2.9%
		Remainder	970	18.5%			Remainder	2,293	39.7%

Source: American Community Survey (2006-2010); & RKG Associates, Inc.

- **Conclusions** – In general, the commuting patterns “in to” and “out of” Falmouth are to and from neighboring Maine communities, although there may be some opportunities to lower the 40 percent of the Falmouth workforce that commutes from elsewhere in Maine, provided housing options were available and the commuters were seeking to relocate closer to work.

B. Real Estate Indicators

Selected for lease and for sale commercial properties (and land) in Falmouth are presented next, followed by summary conversations RKG had with local area real estate professionals active in the Falmouth market. A sampling of properties from Loopnet commercial services (Table 8) indicates approximately 33,200 SF of office space currently marketed in Falmouth with an average asking lease rate of \$12.60 per SF. The average property size is 3,700 SF, ranging from 1,900 SF to as much as 7,600 SF. This space represents a mix of class A and class B office space (this listing is not necessarily exhaustive, but represents a sample of properties from the source cited).³

According to CB Richard Ellis there is approximately 910,200 SF of office space in the Falmouth-Cumberland-Yarmouth submarket and approximately 11.8 million SF in the metropolitan area, indicating the submarket account for almost eight percent of the metropolitan market with respect to office space. Assuming that five percent is Falmouth only, the previously identified (Table 6) countywide projected demand for 27,120 SF of office space, as a function of employment growth, equates to an annual demand of slightly less than 1,500 SF in Falmouth. If so, the marketed office vacancies in Falmouth, at 33,200 SF, represents a multi-year supply of office space, excluding space for end users or tenants with specific needs and/or build-out.

³ CB Richard Ellis defines Class A office buildings as those that are investment-grade properties featuring a unique design with immediate access to parking. They must be ADA compliant and benefit from highly professional property management. Class B office buildings are considered to offer utilitarian space without special amenities, are of ordinary design, except for historic, renovated buildings and feature good maintenance with all floors handicapped accessible.

Table 8 – Sample of for Lease Properties – Falmouth, ME (December 2016)

Selected Falmouth, ME properties available (12-2016)	SF/acres For		Percent for Lease	Asking \$/SF/acre	Building Type (class)	Terms
	Lease	SF Total				
RETAIL						
240 US Route 1	4,636	75,000	6.2%	\$ 12.00	free standing	NNN
206 US Route 1	3,100	3,100	100.0%	\$ 30.00	restaurant	NNN
TOTAL	7,736	78,100	9.9%	\$ 19.21		
OFFICE						
50 Depot Road	7,616	7,616	100.0%	\$ 15.00	office (B)	NNN
19 Northbrook Drive (unit 1)	2,000	6,085	32.9%	\$ 17.75	office (A)	NNN
170 US Route 1	1,933	22,000	8.8%	\$ 14.25	office (B)	Mod Gross
6 Fundy Road	2,700	20,486	13.2%	\$ 12.00	office (B)	NNN
60 Gray Road	6,410	9,700	66.1%	\$ 7.50	office (B)	NNN
75 Leighton Road	5,500	5,500	100.0%	\$ 12.75	office (A)	NNN
12 Northbrook Drive	2,750	12,000	22.9%	\$ 13.00	office (A)	NNN
74 Gray Road	2,304	12,097	19.0%	\$ 8.00	med office (A)	NNN
19 Northbrook Drive (#202)	2,000	6,085	32.9%	\$ 17.75	med office (A)	NNN
TOTAL	33,213	101,569	32.7%	\$ 12.57		
LAND						
231 US Route 1	0.79	75,000		\$ 94,937	retail lot	na

Source : LoopNet commercial services and RKG Associates, Inc. (2016)

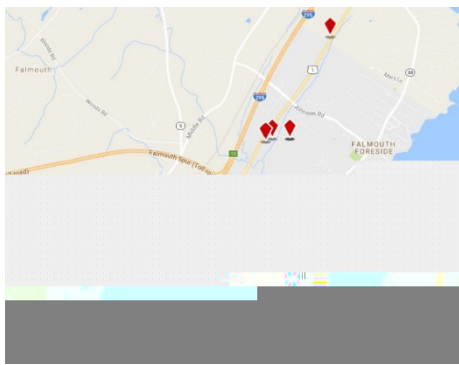


Figure 2 – Sampled for Lease Properties

Many of the sampled for lease properties are along Route 1 (Figure 2) with some in the Route 1 Corridor Study Area.

Loopnet commercial services also indicated several for sale properties in Falmouth (Table 9), mostly available land. The average asking price per acre for this land was

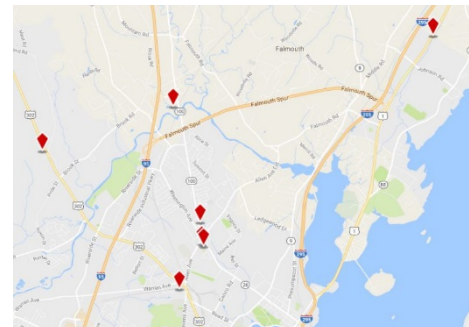


Figure 3 – Sampled for Sale Properties

around \$98,700 with land ranging from less than one-acre to more than 50-acres. The sample of for sale retail and offices properties is considered too small to draw any substantive conclusions. The location of many of the sampled for sale properties (Figure 3) are in proximity to Interstate-95, although land is listed within the Route 1 Corridor Study Area.

Table 9 – Sample of for Sale Properties – Falmouth, ME (December 2016)

Selected Falmouth, ME properties available (12-2016)	SF/acres For		Asking \$	Asking \$/SF/acre	Building Type	Terms
	Sale	SF Total				
RETAIL						
1234 Clearwater Drive	26,000	na	\$ 5,200,000	\$ 200.00	Tidewater Village	na
OFFICE						
60 Gray Road	48,728	na	\$ 4,200,000	\$ 86.19	Portland North BP	na
75 Leighton Road (unit 75)	5,500	na	\$ 1,017,500	\$ 185.00	office condo	na
TOTAL	54,228		\$ 5,217,500	\$ 96.21		
LAND						
Clearwater Drive	3.45	na	\$ 385,000	\$ 111,594	commercial	na
Gray Road Exit #53	0.75	na	\$ 475,000	\$ 633,333	office	na
US Rout1 and Johnson Road	52.00	na	\$ 1,500,000	\$ 28,846	commercial	na
71 Foreside Road	31.00	na	\$ 6,250,000	\$ 201,613	residential	na
TOTAL	87.20		\$ 8,610,000	\$ 98,739		

Source : LoopNet commercial services and RKG Associates, Inc. (2016)

1. Broker Interviews

As part of this analysis, RKG tried to speak with area brokers and real estate professionals active in the Falmouth market and knowledgeable of the Route 1 Corridor Study Area properties and location (refer to Figure 4 and Figure 5). Because of the holiday season, only a few surveys were completed.

A representative of CBRE/The Boulos Company indicated that the Route 1 corridor north of the spur was not typically considered as a destination for local consumers given the retail development to the south along Route 1. If a large anchor-type retailer could be attracted to the Route 1 Corridor Study Area this may stimulate interest in additional retail development, give a new destination draw. Otherwise traffic counts are generally low for regional and national chain interests. Maine DOT estimated 7,319 average daily traffic (ADT) at Route 1 and Johnson Road; VHB indicated an ADT of 9,239 from the spur to Johnson Road and 7,763 from Johnson Road to the Cumberland town line. There are retail vacancies along the southern portion of Route 1 (south of the spur) and any new retail, other than local and auto services, within the corridor may be problematic. The more likely development, if any, within the corridor would be for small office and personal/professional services uses, however, without an end user or tenants in hand speculative development is also problematic. The interviewer also indicated that there may be topographic challenges to developing the land between Route 1 and the Interstate, and if so, this would add to development costs to be passed along to any prospective tenant in their lease rate.

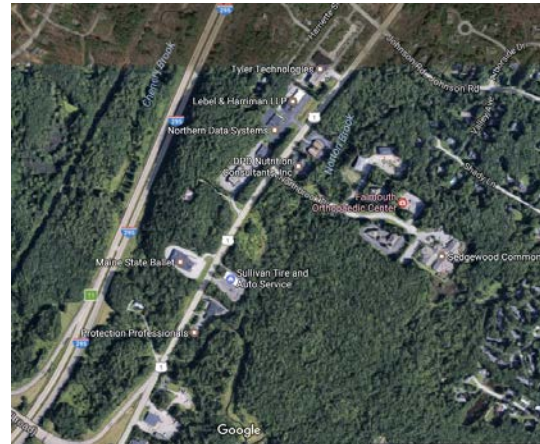


Figure 4 – Route 1 from Spur to Johnson

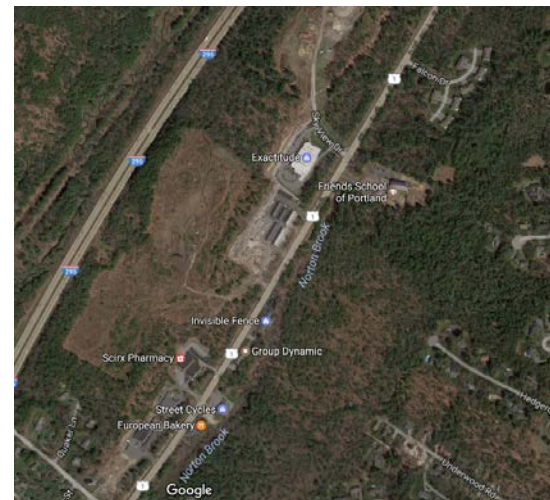


Figure 5 – Route 1 from Johnson to Falcon

A former broker familiar with the corridor (and who represented several transactions along route 1) confirmed these findings and indicated that Falmouth as an office location is secondary to downtown Portland as well as to the Maine Mall area. It has attracted smaller firms but primarily for location reasons relative to the residency of the owner and/or key staff. He further indicated that it is not financially feasible to build office space (especially Class A space) on a speculative basis, since obtainable rents of \$12 to \$15 cannot support total development costs of \$150 to \$200 or more per square foot. In addition, the topography of some of the available vacant parcels along Route 1 North make development more difficult and costly.