

# OceanView

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AT • FALMOUTH

July 6, 2009

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

Re: OceanView Retirement Community: Proposed Revisions to Overlay District

Dear Council Members:

On behalf of John B. Wasileski and OceanView Retirement Community, please accept this letter asking you to consider revisions to Falmouth's Retirement Community Overlay District. The overlay district was developed in cooperation with the Town of Falmouth in 1998 and has been an important tool in guiding the positive development of OceanView for the last 10 years. However, after discussions with the planning staff, we feel that this is an appropriate time to update the ordinance to facilitate future growth. The proposed changes are relatively modest yet provide important design flexibility in planning the future of the community. The following letter and attachments are a description of what we are proposing and why.

## I. Background

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

Since 1986, this senior living concept has flourished at OceanView. Falmouth is an ideal home for OceanView and the larger community has embraced OceanView as an important resource for their family and friends. Additionally, OceanView has worked closely with the town over the years to ensure the community grew in a well-planned, responsible manner. This partnership helped OceanView stay competitive in a demanding marketplace while also remaining a conscientious, courteous neighbor. We look forward to continuing this relationship in the years to come.

## II. The Evolution of OceanView from 1986 to 2009

OceanView has grown in several stages over the last 23 years. Attached you will find three documents that summarize this growth and depict potential future growth of the community. The first document is a power point presentation with pictures and information on the history of the community. The second document is a site plan that highlights potential future projects. The third document depicts the growth in terms of tax value and tax revenue.

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The following is a brief description of the stages of growth:

1. Initial Development 1983 to 1986. The initial development included the 50 apartment independent living lodge building (the lodge) and 20 modest cottage homes (1-20) in triplex and quadriplex buildings.
2. Falmouth House & Cottage Expansion 1996 to 2000. The 1990's included 47 additional cottages (21-64, T1-T3) and the addition of the 38 apartment Falmouth House Assisted Living Community. It was during this period that the Town and OceanView recognized the need for a special zoning district for OceanView. The district was adopted in 1998.
3. Renovation & Expansion of the Independent Main Lodge 2003 to 2004. By 2000, the need for a renovated and expanded main lodge complex was clear. This resulted in the construction of the new Hilltop Lodge, a renovation of the Main Lodge and the addition of several new common areas and amenities in 2004.
4. Whipple Farm Cottage Expansion 2005 to 2009. Approached by neighbors interested in selling their land, the community and the overlay district were expanded by the Town Council in 2005. On approximately 15 acres, the Whipple Farm development is a special blend of land conservation, historic preservation and high quality residential development and design (40 cottages & 2 apartments in the barn complex).

Over the last 23 years, numerous competing projects have been built in the greater Portland area. Despite this increasing competition, OceanView maintains its leadership in the industry through a conscious program of maintenance, improvement and expansion. Today, OceanView includes a wide array of senior living choices at a number of different price points. It includes the options and amenities to compete with the newest communities but the charm and character of a mature community. This commitment to maintaining quality and character while seeking continual improvement must continue for OceanView to remain successful.

### III. Proposed Revisions & Updates to the Retirement Community Overlay District

The overlay district is an essential element in OceanView's success. It provides OceanView with the flexibility and density to craft an attractive, economically viable development like Whipple Farm. At the same time, it provides the structure and controls to ensure that OceanView grows in a responsible manner.

*It is important to note at this time that this proposal is in no way related to the adjacent school property. Any potential project related to any portion of the school land would involve (1) a new application to the Town Council; (2) a new master plan for any such development; (3) approval by the Town Council of a master plan; and (4) approval of an expansion of the overlay district to cover the new property. The current proposal to the Town Council relates only to the current overlay district and the current campus only.*

In the fall of 2008, OceanView began project planning for a renovation and expansion of both the main lodge and the assisted living lodge. It was during this planning process -- including meetings with town staff and the planning board -- that we encountered some challenges with the overlay district. The key issue is a 70,000 square foot size limitation on lodge buildings. We could have redesigned the project to meet this requirement but it would undermine the purpose of the project to provide thoroughly renovated and new apartments that are competitive in today's marketplace. For this reason, we decided to approach the council with a set of proposed revisions that would address not only the lodge size limitation but also clarify other provisions that might unnecessarily restrict future improvement on the campus.

The following is a brief summary of the proposed revisions:

1. *Size of the Lodge Buildings.*

- a. Proposed Revision. Expand the size limitation of the lodge buildings from 70,000 square feet to 100,000 square feet.
- b. Reason. The original lodge building and its apartments are small by today's standards. Any future project would include renovations and expansions similar to the Hilltop Lodge project.

2. *Height of the Lodge Buildings.*

- a. Proposed Revision. Increase the allowable height of the lodge buildings from three stories and 39 feet to four stories and 45 feet.
- b. Reason. The calculation to determine the height of a building is complicated on a sloping site like OceanView. We are proposing the additional 6 feet to ensure that we have design flexibility.

3. *Density.*

- a. Proposed Revision. Increase the density from 7,500 sq. ft. per unit and 2,500 sq. ft. per bed to 6,000 sq. ft. per unit and 2,000 sq. ft. per bed, respectively. A summary of the current and proposed density is attached for your information.
- b. Reason. We have some excess density at this time but would like to increase it somewhat to support potential future development – especially in the lodge buildings.

4. *Definitions.* Revise the definition of “congregate housing” and add a definition for “assisted living” to reflect the current status of those terms in the senior housing industry.

5. *Parking.* In conjunction with the revisions to the definitions, add a specific parking requirement for “assisted living” to the ordinance.

Attached please find a redlined version of the ordinances to see the specific revisions we are proposing. To put the impact of these revisions into some kind of context, the Falmouth Planning staff suggested we show how these changes might assist in future development at OceanView. The following is a summary of potential projects that might benefit from revisions to the overlay.

#### IV. OceanView in the Future

To a large extent, the current OceanView campus is “built-out”. The limited open space remaining on the campus prohibits any major expansion. What we forecast over the next several years are projects similar to the addition of the Hilltop Lodge in 2004. These projects will focus on the renovation, improvement and expansion of our current buildings.

To give you an idea of what these projects might look like, we have attached the “present and future” site plan that includes five (5) potential projects on the current campus. A quick summary of these projects:

- A. Renovation and Expansion of the Main Lodge. This project includes the renovation of 12 units and the addition of 12 units to the current lodge building.

- B. Expansion of Falmouth House Assisted Living Community. This is a 2 phase expansion of the assisted living community – adding 10 units per phase.
- C. Potential Future Expansion of the Main Lodge or Hilltop Lodge. These projects might include additional apartments and common areas / amenities.
- D. Creation of a Memory Support Assisted Living Community. Currently, OceanView does not operate a memory support community for residents with more severe memory loss or Alzheimer's type conditions.
- E. Renovation and/or Replacement of Older Cottage Homes. We may consider replacing these older cottages with a newer design.

The purpose of all of these projects would be to improve the community for the benefit of our current residents and to attract future residents. The real estate and senior housing industries are dynamic markets. With the shift from the depression era & World War II generation of seniors to the baby boomers, the changes will be dramatic. Other factors like the disturbing growth in Alzheimer's and related conditions also come into play. We are requesting the revisions to the overlay district to provide us with the financial ability and design flexibility to meet these challenges.

Finally, the proposed revisions have received a comprehensive review prior to submission to the Falmouth Town Council. This includes a review by David Haynes, the landscape architect that has designed the community from its inception, and Mark Eyerman, the planning consultant who drafted the original overlay district in cooperation with the Falmouth Planning Department. Finally, they have also been reviewed by the current Falmouth Planning Department.

This submission includes the following documentation and plans.

V. Exhibits & Plans

1. PowerPoint Presentation on OceanView since 1986
2. Site Plan – OceanView Present & Future
3. Falmouth Ordinances with Proposed Revisions
4. OceanView Tax Value and Revenue History
5. OceanView Density Summary
6. Site Plan of OceanView Campus

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

Very truly yours,



Matthew D. Teare, Director of Development  
Sea Coast Management Company

Enclosures

Cc: John B. Wasileski  
Ronald Epstein, Esq.