



Flathead County Planning & Zoning

1035 1st Ave W, Kalispell, MT 59901
Telephone 406.751.8200 Fax 406.751.8210

PLANNED UNIT DEVELOPMENT OVERLAY APPLICATION

*Submit this application, all required information, and appropriate fee (see current fee schedule)
to the Planning & Zoning office at the address listed above.*

FEE ATTACHED \$ 957.50

DEVELOPMENT NAME: Rising Mountains Assisted Living of Bigfork

OWNER(S) OF RECORD:

1. Name: Roman Catholic Bishop of Helena Phone: 406-442-5820 ext. 40
2. Mail Address: PO Box 1729 attn: Pete McNamee
3. City/State/Zip: Helena, MT. 59624
4. Email: Pete McNamee PMcNamee@diocese.org
5. Current zoning: SAG-5 PUD overlay requested: SAG-5
6. Type of PUD: Residential Commercial Industrial Marina Mixed use

APPLICANT/TECHNICAL/PROFESSIONAL PARTICIPANTS:

Name: Bill and Charlene Dale (Applicant) Phone: 406-270-2747
 Mailing Address: 12036 Rippling Waters
 City, State, Zip: Bigfork, MT 59911
 Email: swandive@centurytel.net

Name: Michael Fraser Phone: 406-253-4326
 Mailing Address: 690 North Meridian, Sute 103
 City, State, Zip: Kalispell, MT. 59901
 Email: mfraser@montanasky.net

PLEASE PROVIDE THE FOLLOWING INFORMATION ABOUT THE PROPERTY UPON WHICH THE PUD OVERLAY DISTRICT IS REQUESTED:

- A. Address of the property: 195 Coverdell Road
- B. Legal Description: A portion of Tract A of COS 12910
 [Lot and Block of Subdivision or Tract #(s)]
13 - T27N - R20E
 Section Township Range (Attach sheet for metes and bounds)
- C. Total acreage: 5.25 acres (must contain at least 2 acres)



- D. Is the PUD located where public and private facilities and services are available or will become available by the time development reaches the stage where they will be required? Sewer is in the property. A water main will be extended from the Catholic Church to the east boundary of the parcel.
- E. Is the property under single ownership? Yes. The Catholic Diocese of Helena.

PLEASE DISCUSS THE PROPOSAL IN RELATIONS TO THE FOLLOWING REVIEW CRITERIA:

- A. Promoting the Growth Policy: SEE THE ATTACHED FOR A DETAILED RESPONSE TO A THRU G.

- B. Extent to which the plan departs from the underlying zone and the subdivision regulations including but not limited to density, bulk and use, and the reasons why such departures are not detrimental to the public interest: _____

- C. The nature and extent of the common open space in the PUD project, the reliability of the plans for maintenance and conservation of open space, and the adequacy of the amount and function of the open space: _____

- D. The adequacy of the proposals provision for public services, control over vehicle traffic and amenities of light or air, recreation, and visual enjoyment: _____



E. The relationship of the planned development project to the neighborhood in which it is proposed: _____

F. In the case of a plan that proposes development over a period of years, the sufficiency of the terms and conditions proposed to protect and maintain the integrity of the plan:

G. Conformity with the applicable provisions of this chapter: (specifically 3.31.030 4. Use Regulations and 5. PUD Preliminary Plan)

The signing of this application signifies approval for FCPZ staff to be present on the property for routine monitoring and inspection during approval process.

Applicant Signature

*Most Reverend George Leo Thomas
Bishop of Helena*

3-20-12

Date



SUPPLEMENT TO PUD APPLICATION
FOR
“RISING MOUNTAIN ASSISTED LIVING AT BIGFORK”



INTRODUCTION

The subject property, 5.25 acres, is zoned SAG-5. Current Regulations limit community residential facilities to Class 1 and 2 to a SAG-5 zone. The limitation is due to Class 3 facilities requiring public water and sewer service. The subject parcel adjoins the Bigfork County Water and Sewer District. Sewer is on the south side of the parcel. Water is available approximately 1,000 feet west along Coverdell Road. The parcel is by sewer and can be served with water.

This area of SAG-5 is unusual in Flathead County as it is served with public water and sewer, is accessed by paved local road, is within the Bigfork Fire District and is served by the Bigfork QRU.

This Planned Unit Development will establish the requirements for placing a Class 3 facility on the 5.25 acre parcel shown on the attached exhibits. In February the Commissioners adopted the final resolution zoning the parcel SAG-5. During the hearings the applicant discussed the need for an assisted living facility in the BPA. This application is the second step in the process.

Rising Mountain Assisted Living at Bigfork will initially be a 28 bed facility with the possible future addition of two wings of 4 rooms each. The Planned Unit development will be for a 36 bed facility.

An assisted living resident is a senior citizen who does not need the intensive care of a nursing home but prefers more companionship. The resident needs some assistance in day to day living. Rising Mountain will have apartments of varying sizes. All will be equipped with microwaves and refrigerators. Most residents will take meals in the dining area prepared by the central kitchen. Recreational activities are available throughout the day in common areas.

Following are responses to the narrative questions in the application:

PLEASE DISCUSS THE PROPOSAL IN RELATIONS TO THE FOLLOWING CRITERIA:

- A. Promoting the Growth Policy: The subject property is within the area covered by the Bigfork Land Use Plan (BLUP) which was adopted as part of the Flathead County Growth Policy. BLUP contains eight sections with an overview of conditions, goals and policies. Listed below are quotes from the BLUP which promote this type of use within the planning area.

THE BIGFORK VISION-

- Create an amenity oasis that provides and attracts desired services while

complementing the natural surroundings.

- Promote quality development and protection of the natural surroundings at all economic levels.

Bigfork has a wide variety of amenities: medical and dental offices, recreational, a nursing home, a theater, dining, shopping and educational. A community residential facility will augment the services available to residents and their families. The careful and tasteful design will provide a quality facility with minimal impact on the surroundings.

POPULATION AND ECONOMICS GOALS AND POLICIES-

- Goal G.3 Infrastructure must be sufficiently developed to support population growth and economic development.
 - P.3.1 Require all new development to pay for and carry its share of costs through impact fees or other methods, for infrastructure such, but not limited to, public and community water and sewer, additional transportation, road requirements, and other needs consistent with Flathead County impact fee regulations, should they be established.
- Goal G.4 Provide for the aging population in the Bigfork Planning Area (BPA).
 - P.4.1 Encourage, as needed, the establishment of senior citizen facilities.

BCWSD has a sewer main on the south boundary of the PUD. The main and downstream infrastructure is sized for the proposed facility. A 12 inch main is in place 1000 feet west of the site and has adequate capacity and pressure for the facility. When Rising Mountain connects to the water and sewer hookup fees will be paid to the District as payment for capacity. A late comers fee will also be paid to the District as a principle payment for the North Sewer project from Bigfork to the site.

Rising Mountain will be an assisted living facility for the aging population in the planning area, the first such facility with this specific focus.

HOUSING GOALS AND POLICIES

- G.6 Encourage and support residential development densities which are appropriate to the existing or planned public infrastructure and services, which are absent of environmental constraints, and which enhance the character of the community.
- P.6.2 Suburban residential densities should be located in areas with paved roads, convenient access to commercial services, public services and facilities, and should have minimal environmental constraints.

- G.7 Encourage the development of affordable housing and special needs housing opportunities in the BPA.
- P.7.1 Promote special needs and affordable rental and owner-occupied housing in and around Bigfork.
- P.7.6 Require all new development to pay for and carry their share of the costs, through impact fees or other methods, for infrastructure such as, but not limited to, public and community water and sewer, additional transportation, road requirements, and other needs, consistent with Flathead County impact regulations, should they be established.
- G.8 Encourage housing that maintains traditional patterns while protecting property values and natural resources.
- P.8.3 Encourage new development of housing sites of less than five acres, to consider utilizing public water and sewer. Require mandatory installation of underground utilities, where technically and economically feasible, and recommend that developers pay for exterior road improvements.
- P.8.4 Prevent construction in flood plains, wetlands and natural drainage areas. Recommend development to conform to terrain, and minimize grading on steep slopes to prevent scarring and erosion.

The site topography is gently sloping up to the north. Soils are not erodible and suitable for foundations. None of the site is within a flood plain, wetlands, or natural drainage area. Coverdell Road is paved to County standards.

Assisted living choices are not currently available in the BP. Rising Mountains will address a senior housing need for the aging population in the area.

Rising Mountain will pay to the District for connect of water hook up and plant investment fees, sewer hook up and plant investment fees and late comers fees for the North sewer totaling nearly \$115,000, based on a 2 inch water service.

Rising Mountains will rely on natural toned colors, wood and native stone appearances along with a landscape theme focusing on pines, junipers, firs and native deciduous trees

to soften the road side appearance. The structure height will be less than allowed by the Bulk and Dimensional Requirements of the SAG-5 zone and thereby reduce the impact on the site line to the mountains.

Telephone is in place along the south boundary and is underground. Power is overhead on the south right of way of Coverdell Road. Power to the site would be placed underground at the developer's expense.

LAND USE AND NATURAL RESOURCES

Residential Development

- G.17 Accommodate increased growth through development that harmonizes with and enhances the natural environment, and protects the wildlife habitat.
- P17.1 Development should be located to maximize the advantage of existing infrastructure and minimize the demand for additional infrastructure, such as roads or road improvements, and expansion of utilities.
- P17.3 All development shall include a system of managing storm water runoff.
- P 17.8 All developments shall provide alternative fire exits routes.

Environmental Concerns

- G.22 Insure a social and economic balance of health, safety, and welfare while preserving the natural environment of the BPA.
- P.22.2 Consistent with Flathead County Zoning Regulations, outdoor lighting shall limit light pollution while remaining safe.
- P.22.4 When development requires an extension of telephone or electrical service, lines should be installed underground.
- P.22.5 County garbage collection areas should be screened or bermed from view.
- G.24 Encourage development to use appropriate practices to preserve water quality, especially where affected by street runoff and septic systems, prevent erosion, control weeds and promote fire safety in timbered areas.
- P.24.4 Development should contain measures to control and minimize pollution (air, water and ground), erosion, soil maintenance, sediments, fire flooding and hillside damage. Development should preserve prime soil.
- P.24.5 Development should protect the surface and subsurface waters from pollution and depletion through appropriate wastewater management systems and non-source pollution controls.
- P 24.7 Development should limit the introduction of noxious weeds during construction and restore any land or vegetation damaged during construction to its pre construction condition or better.
- G 25 Utilize county zoning to protect environmentally sensitive open space,

scenic views and natural habitat in the BPA through use of buffers, setbacks, and creative planning techniques.

- P 25.1 Development shall adhere to Flathead County setback requirements.

Prior to selecting the site a detailed review was made of properties in the BPA. A site with utilities and approximately 5 acres in size were the two criteria major criteria. A secondary need was appropriate zoning. The site subject to the PUD application was the only site meeting the minimum criteria.

The Soils Survey of the Upper Flathead Valley classifies the soils as Blanchard loamy fine sand, capability unit IVes-1. Only soils in capability classification I, II and II are recommended for regular cultivation. Soils at the site are not classified as prime agricultural.

During the development process a construction storm water plan will be prepared for DEQ approval. The plan improvements must be installed before construction begins. The plan will implement best management practices to protect surface water and ground water from being negatively affected by runoff. The storm plan will limit runoff leaving the site to predevelopment flows. Development flows will be retained onsite and allowed to infiltrate in retention basins.

A requirement of the PUD is a landscape maintenance plan, enclosed is a Soil Disturbance and Weed Management Plan in fulfillment of this requirement. The plan addresses restoration and weed management to mitigate impacts.

The attached site plan demonstrates compliance with the setback requirements of the SAG-5. Lot coverage of the proposal is 12 % which is less than the allowed coverage of 25%, or 57,170 square feet.

Lighting will be limited. Building security and landscape lighting will be placed for safety. Because there are no night activities there is no need for street lights or light standards in the parking areas.

A garbage enclosure location is shown on the site plan with screening. Collection and hauling to the County Landfill be contracted with a private hauler.

- B. Extent to which the plan departs from the underlying zone and the subdivision regulations including but not limited to density, bulk and use and the reasons why such departures are not detrimental to the public interest.

ZONING

The parcel is currently zoned SAG-5. The zone is intended to preserve small agricultural functions and to provide a buffer between urban and unlimited agricultural uses, encourage separation of such uses in areas where potential conflict of uses will be minimized Community residential facilities of eight or fewer are allowed by administrative conditional use. The limitation of eight is the result of SAG-5 typically not having public water or sewer. The site proposed has public water and sewer and thus impact to the environment has been mitigated.

The zoning regulations require a conditional use permit for Class 3 facilities, 12 or more persons. A conditional use is required, "because of size, technological process or equipment, or because of the exact location with reference to surroundings, streets and existing improvements, or demands upon public facilities, requires a special degree of control to make such uses consistent with and compatible to other existing or permissible uses in the same district."

Size- Lot coverage is limited to 25% in the SAG-5. The proposed facility will be approximately 26,750 square feet, less than the 57,172.5 square feet allowed.

Technological Process- All operations required for the facility are residential in character, food preparation, individual recreation, group recreation, laundry and community interaction.

Equipment- The kitchen is commercial size, and does not have any external equipment which would cause odors or sound. The same is true for the laundry.

Setbacks- The facility will conform to all setback requirements.

Maximum Height- The facility will conform to the 35 foot height restriction. As a single story structure the project height will be approximately 21 feet above ground grade.

Other site criteria in the Zoning Ordinance are parking, traffic, open space, fencing or screening, landscape, signage and lighting. The enclosed site plan addresses the minimum parking requirements, open space and landscaping. Lighting will be the minimum required for security and be downward focused. Signage is governed by the County Ordinance.

The proposed use does not in this location create impacts which would be detrimental to the public interest.

Zoning, SAG-5, does not allow a Class 3 residential facility, as the zone is not typically served with public water and sewer. The PUD propose to modify the zoning to allow the facility on this site. No other uses would be allowed under the PUD. The PUD process provides the mechanism to impose the special degree of control to assure compatibility with the surrounding uses, either existing or permitted.

Population changes in Bigfork have resulted in a higher percentage of retired people. As this segment of the population ages, alternative housing choices are needed to address allow continued residency in their home community. The assisted living facility is in the best interests of the community.

The proposed PUD will only allow a single permitted use, A Class 3 Community Residential Facility. No conditional uses will be listed. This provision will limit the property to the community residential facility.

The proposed PUD complies with ALL other provisions of the SAG-5 zone and Zoning Regulations.

SUBDIVISION

The tract will be subject to subdivision, Section 4.2.3, First Minor Subdivision Administrative Approval of Preliminary Plat. The process will be initiated during the PUD process. The proposed lot complies with the ten criteria listed in 4.2.3.a. for Administrative Approval, in particular:

Contains fewer than three parcels....

Property is zoned....

No subdivision variance is needed...

All lots have access to a public dedicated right of way...

Each lot has a driveway compliant with

There are no environmental hazards....

Each can be served by public sewer and water...

No significant effects are anticipated on agricultural user facilities, local services Natural environment, wildlife, wildlife habitat, and public health and safety.

The proposed 5.25 acre parcel will be in conformance with the development in the Area, will not require any variances and will not be detrimental to the public interest.

- C. The nature and extent of common open space in the PUD project, the reliability of the plans for maintenance and conservation of open space, and the adequacy of the amount and function of the open space:

The PUD will allow a single structure on the parcel, the access driveway, parking and a landscape area around the building. All areas not immediately around the building

will remain in native grasses. The total area of the building, driveway and parking is approximately 56,000 square feet, 24% of the site. Approximately 3.9 acres will be undisturbed and maintained as open area. Adoption of the PUD will assure the site development is limited to 56,000 square feet. Enclosed is Weed Management plan, which will be implemented as part of the site development. Areas the building will be landscaped with sod, low growing shrubs, hardscape ground cover and native conifers and deciduous trees. Maintenance of the open space and landscaped areas will be the responsibility of the owners of the facility.

D. The adequacy of the proposals provision for public services, control over traffic and amenities of light or air, recreation and visual enjoyment.

An annexation petition has been prepared for submission to the Bigfork County Water and Sewer District, a copy is enclosed. Annexation will occur on April 11, 2012. Annexation will allow the hook up for sewer and water main extension and hook up for water. The existing 8 inch sewer has capacity for the proposed 36 beds, approximately 3,060 gallons per day. A 12 inch water main will serve the site. Pressures are approximately 58 psi. A flow test of the fire hydrant at the driveway to the Catholic Church demonstrated 2200 gallons per minute

Prior to construction a Construction Storm Water permit will be required. A plan, utilizing best management practices will be prepared addressing placement of silt fencing and retention areas to retain any storm water onsite. Subdivision will require preparation of a storm drainage design and approval by Montana Department of Environmental Quality. The submitted site plan shows the schematic locations of onsite retention basins. Per DEQ requirements no post development storm water may discharge off site.

Power and telephone are in place along the right of way of Coverdell Road. The power may have to be upgraded for the demand. The upgrade would follow the existing pole line. Both telephone and power would be placed underground from the pole line to the facility.

Coverdell Road is asphalt paved to a width of 24 feet as far as the Catholic Church. It is paved to a width of 22 feet past the site. Flathead County Road and Bridge maintains traffic counts for County Roads. In 2009 the average daily traffic (ADT) for Coverdell Road was 264 vehicle trips per day. The estimated ADT for a 36 bed assisted living facility from data in the ITE Trip Generation Manual 8th Edition with eight employees is 127 vehicle trips per day. During the morning peak hour, 6:30 to 8:00 AM, the estimated trips is 6. In the evening the estimate is 10 vehicles trips. Because of the assisted living use traffic generation is spread though the day to a greater degree than normal household generation. The increase in traffic would not alter the level of service. Coverdell Road is adequate for this overall small volume of traffic. Before the driveway is constructed, a County Approach permit will be needed.

As a comparison, permitted uses in the SAG-5 include parks and publically owned recreational facilities. The ITE Handbook estimates these facilities could generate between 50 and 100 vehicle trips per day. Permitted uses are allowed without review. The traffic impact from the assisted living facility is minimal over traffic from permitted uses.

Adequacy of light or air, recreation and visual enjoyment is assured by compliance with the bulk and dimensional requirements of the zoning and adherence to the development plan and architectural styling proposed.

E. The relationship of the planned development project to the neighborhood in which it is proposed.

Areas adjoining Coverdell Road and served by Coverdell are the neighborhood. Uses in the neighborhood are:

- Catholic Church*
- Church Office*
- Church Parsonage*
- Construction Yard*
- Nursery*
- Extractive Industry*
- Residential*

Based on area of use residential is the largest area. From an impact perspective either the extractive industry or construction business may have the greater impacts.

Generally, the neighborhood is mixed both in use and zoning. County B-3 is south of Coverdell with the nursery and mini storage. A portion of the construction business is located in a SAG-10, most of these parcels do not conform to the zoning. Residential uses east of the site vary from an AG-20 to SAG-5, some lot sizes conform, others do not.

Placing a community residential facility on 5.25 acres which is landscaped and constructed with a lower roof line, timber and stone treatments and earth tones colors will compliment the church. The facility is residential feel except on a scale greater than a single family residence. It will be in character with the neighborhood.

F. In the case of a plan which proposes development over a period of years, the sufficiency of the terms and conditions proposed to protect and maintain the integrity of the plan.

The proposed PUD is for a 36 bed facility. Initial construction will be 28 beds. In the future as market demands the additional eight rooms will be added either as a project or two projects. If the market will not support the additional rooms the facility will