Loudoun County, Virginia
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At a reconvened business meeting of the Board of Supervisors of Loudoun County, Virginia, held in the County Government Center, Board of Supervisors' Meeting Room, 1 Harrison St., S.E., Leesburg, Virginia, on Friday, October 28, 2005 at 4:00 p.m.

PRESENT: Scott K. York, Chairman
Bruce E. Tulloch, Vice Chairman
James G. Burton
Sally Kurtz
Stephen J. Snow
Mick Staton Jr.
Lori L. Waters

ABSENT: James E. Clem
Eugene A. Delgaudio

IN RE: TRANSPORTATION/LAND USE COMMITTEE REPORT / RETIREMENT HOUSING CPAM: CPAM 2004-0006, POTOMAC VIEW ACTIVE ADULT AGE RESTRICTED HOUSING, CPAM 2004-0011, ASHBURN VILLAGE AGE RESTRICTED HOUSING, CPAM 2004-0012, BRAMBLETON ACTIVE ADULT RETIREMENT COMMUNITY, CPAM 2004-0023, ERICKSON RETIREMENT COMMUNITIES

Mrs. Waters moved that the Board of Supervisors include the following to Section 16 of the Retirement Housing Policies: "i: The proposed development is not adjacent to land that is designated for Extractive Industry on the Land Use Map."

Seconded by Ms. Kurtz.

Voting on the Motion: Supervisors Burton, Kurtz, Snow, Staton, Tulloch, Waters, and York - Yes; None – No; Supervisors Delgaudio and Clem – Absent for the Vote.

Mr. Staton moved that the Board of Supervisors approve the Countywide Retirement Housing policies as contained in Attachment 2 and as amended at the recessed October 18, 2005 Business meeting which was reconvened on October 28, 2005.

Seconded by Mr. Snow.

Voting on the Motion: Supervisors Burton, Kurtz, Snow, Staton, Tulloch, Waters, and York - Yes; None – No; Supervisors Delgaudio and Clem – Absent for the Vote.

COPY TESTE:

Denise Royce

DEPUTY CLERK FOR THE LOUDOUN
COUNTY BOARD OF SUPERVISORS

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CPAM 2004-0006, Potomac View Age Restricted
CPAM 2004-0011, Ashburn Village Age Restricted
CPAM 2004-0012, Brambleton Age Restricted
CPAM 2004-0023, Erickson
Loudoun County General Plan Policy Amendments
Adopted October 28, 2005

Delete text C. Adult/Retirement Housing, General Plan pg. 2-14:

~~**C. Adult/Retirement Housing**~~

~~The County recognizes the increasing need for housing for the active elderly as the population continues to age and supports the location of age-restricted retirement communities in the County. Such uses should be a component of other housing or mixed-use projects so that residents can be fully integrated into the community. Housing for the active elderly also should incorporate on-site facilities and services or ensure that residents have convenient access to needed services and amenities. Such housing is typically moderate-to-high density development and therefore is encouraged in the Suburban Policy Area and the towns.~~

Delete Policy 22 under "Housing Policies, General Plan pg. 2-15:

~~22. Adult/retirement communities are encouraged in areas where conventional residential development is also located, provided:~~

~~a. The proposed adult/retirement community includes on-site services and amenities to serve the elderly community or is within a safe walking distance to such services and amenities.~~

~~b. The proposed density and design of the adult/retirement community is compatible with surrounding residential and non-residential uses.~~

~~c. The proposed use is adequately served by roads, utilities, and other services.~~

~~d. The adult/retirement community complies with the relevant design and location criteria for Suburban Residential Neighborhoods.~~

~~e. The adult/retirement community is visually and physically integrated into adjacent communities.~~

Add text and new policies after Housing Policies, General Plan pg. 2-15:

C. Retirement Housing

The County recognizes the increasing need for housing for seniors as the population continues to age. Diverse interests, needs and abilities characterize this segment of the population, broadly defined as those persons who are 55 years of age or older. To cater to such diverse interests and offer seniors a variety of housing choices, the County promotes a wide variety of housing options including active adult age restricted retirement communities, continuing care retirement communities, assisted living facilities and skilled nursing facilities. The County encourages the development of communities that offer a continuum of care and/or otherwise allow seniors the option of aging-in-place. At the same time, the County will consider development proposals that

cater to the interests of segments of the senior housing market who desire to live in active-adult age-restricted communities. The County encourages the development of retirement communities as components of other residential or mixed-use projects to offer seniors the advantages derived from proximity and access to the services and amenities offered within larger master planned communities. Retirement housing projects should incorporate on-site services and amenities or ensure that residents have convenient access to needed services and amenities through a variety of transportation options.

The County recognizes that housing choices made by seniors vary and that retirement housing developments exhibit different characteristics in order to serve a wide range of needs. It is the intent of these policies to encourage and provide guidance and direction for all types of retirement housing opportunities. It is anticipated that these policies be applied to accommodate a wide diversity in housing stock and a range of incomes in the County's senior population.

General Retirement Housing Policies

1. The County encourages a balance among the different retirement housing types such as active adult, independent living units, congregate living, assisted living facilities and skilled nursing facilities in an effort to meet the continuing needs of retirement age populations and offer seniors a variety of housing choices. Commitment to age restrictions shall be accomplished through the legislative process.

2. To ensure that seniors have access to a range of housing choices, the County encourages the development of a mix of housing types such as single family detached units, single family attached units, multi family units, garden apartments, clustered housing and courtyard units with variations in unit design and lot dimensions within the larger retirement community.

3. The County seeks to integrate retirement housing projects that develop as components of larger master planned mixed-use communities into the larger community. The projects should minimize incompatibilities with surrounding development patterns through integrated design schemes, streetscape design, layout of open spaces and common civic areas, and shared access to amenities and services such as retail centers and recreational facilities within the master planned community.

4. The County promotes the development of affordable housing opportunities within all forms of retirement communities in accordance with the Affordable Dwelling Unit (ADU) provisions of the Loudoun County Zoning Ordinance and the ADU program regulations. The County will amend the ADU program regulations, as necessary, to clarify the exemption of senior citizens from the first-time homebuyer clause outlined in these regulations.

5. In evaluating the appropriateness of proposed retirement communities as infill developments, the County will consider the following criteria:

   a. The availability and accessibility of established services and amenities in the surrounding area,

   b. The compatibility of the proposed retirement housing project with surrounding development patterns. Compatibility is measured in terms of proposed density/use intensity, scale and development pattern, and

   c. The adequacy of the transportation infrastructure, both road networks and pedestrian facilities, to support the proposed development. The County will further consider, as appropriate, the availability of bicycle facilities and transit services such as mini-bus or shuttle services.

6. The County encourages the development of partnerships with educational institutions to promote and facilitate the development of 'Lifelong Learning Centers' targeted to the interests of seniors.

7. The County will amend the Loudoun County Zoning Ordinance to create a new zoning district, Planned Development – Continuing Care Retirement Communities (PD-CCRC), to facilitate the development of continuing care retirement communities, assisted living facilities and skilled nursing facilities.

8. The County will review and amend as necessary the Loudoun County Zoning Ordinance to allow senior centers and adult day care centers as special exception uses in residential zoning districts and as permitted or special exception uses in the PD-AAAR (Planned Development – Active Adult Age Restricted) zoning district and appropriate non-residential zoning districts that support retirement communities, to ensure that seniors have convenient access to support services proximate to their communities.

9. The County will review and amend as necessary its capital facilities policies and adopted procedures for determining the capital facilities impacts associated with retirement housing projects to reflect the service demands of senior populations.

10. The County will develop incentives to encourage the provision of a certain percentage of residential units designed to meet the changing needs of seniors within all new residential developments. This may be achieved through mechanisms such as the incorporation of the 'Universal Design Concept' in design schemes. The County encourages the provision of a variety of housing choices in both existing neighborhoods and proposed developments offering seniors the option of aging in place within their community.

11. A fiscal impact analysis shall accompany all applications for retirement communities to demonstrate the impact of the proposed land use on the long-term economic viability of the County.

Location Policies

Active Adult Retirement Communities

1. Areas planned for Residential land use are the preferred location for the active adult retirement communities in the Suburban Policy Area and the Joint Land Management Areas surrounding the incorporated towns in the County.

2. The County will evaluate proposed applications for active adult retirement communities in areas designated for Business communities and in areas designated for High Density Residential within the Suburban Policy Area based on how well the proposed use meets all of the following evaluation criteria:

   a. The proposed site immediately adjoins an area planned for Residential uses and the proposed design provides a physical transition or incorporates a natural transition between the residential land use and business use,

   b. The scale, density and development pattern proposed is compatible with surrounding development patterns, both existing and planned,

   c. An adequate transportation infrastructure including a road network, pedestrian and bicycle facilities and public and/or private transit opportunities is available to serve senior residents, and

   d. The site offers the advantages of integration with a larger master-planned residential or mixed-use development such as access and proximity to commercial retail, services and recreational facilities within the larger community.

3. The County will evaluate proposed applications for active adult retirement communities in areas designated for industrial uses within the Suburban Policy Area based on whether the proposed use meets the following evaluation criteria:

   a. The proposed site is not located within the 65+ Ldn Noise Zone, and

   b. The proposed site does not border Route 606, and

   c. Where the proposed site immediately adjoins an area planned for Residential uses, and

   d. The proposed development is adjacent to and provides access to a larger master-planned (but not age-restricted) residential community larger than 1,700 acres, and

   e. The scale, density and development pattern proposed is compatible with surrounding development patterns, and

f. An adequate transportation infrastructure including a road network, pedestrian and bicycle facilities and public and/or private transit opportunities is available to serve senior residents, and

g. The site offers the advantages of integration with a larger master-planned residential or mixed-use development such as access and proximity to commercial retail, services and recreational facilities within the larger community, and

h. The proposed development is separated from adjacent industrially-planned properties by a natural boundary or feature, such as an area of floodplain, and

i. The proposed development is not adjacent to land that is designated for Extractive Industry on the Land Use Map.

Continuing Care Retirement Communities Policies

1. The County encourages the development of continuing care retirement communities (CCRCs) which are intended to provide seniors a continuum of care and the option of aging in place through the provision of independent living units, assisted living facilities and skilled nursing facilities as well as an array of services and amenities.

2. Areas planned for Business and Residential uses are considered appropriate locations for continuing care retirement communities in the Suburban Policy Area and Joint Land Management Areas surrounding the incorporated towns in the County subject to the following evaluation criteria:

   a. Where the proposed site immediately adjoins an area planned for Residential uses, the proposed design shall provide a transition between the CCRC and residential or business land use,

   b. The scale, density and development pattern proposed is compatible with surrounding development patterns,

   c. An adequate transportation infrastructure including a road network, pedestrian and/or bicycle facilities and public and/or private transit opportunities are available to serve senior residents, and

   d. The site offers the advantages of integration with a larger master-planned residential or mixed-use development such as access and proximity to commercial retail, services and recreational facilities within the larger community.

3. In the Transition Policy Area, the County supports the development of retirement housing in the form of active adult and continuing care retirement communities. These developments should generally follow the design guidelines outlined for villages with densities not to exceed the maximum permissible rezoning densities in the respective Transition Policy Area subarea.

4. The County encourages the location of active adult and continuing care retirement communities near commercial and retail centers within towns, along main streets, near or at town and urban centers and transit stations, and near the commercial cores within larger master planned communities, to ensure senior residents the benefits of safe and convenient access to the amenities and services typically available in such pedestrian oriented, mixed-use environments.

Scale and Density Policy

1. Densities for retirement housing projects in areas planned for Residential land uses, in the Suburban Policy Area, may range up to 8 dwelling units per acre, in areas planned for High Density Residential, Business, and Industrial land uses in the Suburban Policy Area, densities may range up to 30 dwelling units per acre, with densities measured on the gross area of a parcel.

Land Use and Unit Mix Policies

1. Assisted living facilities, skilled nursing facilities and similar senior care facilities that offer a higher degree of care than typically associated with active adult retirement communities shall be viewed as residential uses for the purposes of application of the land use mix ratio.

2. When developed as part of a continuing care retirement community (CCRC), the number of units/beds proposed in assisted living facilities, skilled nursing facilities and similar senior care facilities shall be counted as residential units for the purposes of estimating the CCRC unit mix.

3. The land use mix in retirement housing projects will generally comply with the following ratios:

Land Use Category	Minimum Required	Maximum Permitted
Residential	30%	60%
Commercial Retail and Service[1]	0%	20%
Civic Space[2]	5%	No Maximum
Parks and Open Space[3]	35%	No Maximum

[1]Retail Policy guidance provided in the Countywide Retail Plan
[2]The definition of Civic Space may include communal facilities such as clubhouses and community centers.
[3]Where retirement housing projects develop at densities between 0 and 16 dwelling units per acre, a minimum of 35% of the gross site area shall be developed as Parks and Open Space. Where retirement housing projects develop at densities between 17 and 30 dwelling units per acre, a minimum of 45% of the gross site area shall be developed as Parks and Open Space. The extent to which these Parks and Open Spaces may be public will be determined on a case-by-case basis during the legislative review of an application based on the need of the Suburban Community within which the proposed project is located and creates a public need for such facilities, the extent of the site, the type of retirement community proposed, site design and the public access to the site. Retirement housing projects outside of the Suburban Policy Area will apply the open space policies of the relevant Policy Area.

4. Densities for assisted living facilities, skilled nursing facilities and similar senior care facilities that offer a higher degree of care shall be calculated as a percentage of the total dwelling units of the continuing care retirement community (CCRC). These unit types shall constitute a minimum of 15% of the total dwelling units of the CCRC.

Phasing Policies

1. In Continuing Care Retirement Communities where assisted living and skilled nursing facilities are provided, these facilities shall be phased with the development of the independent living units, such that residents of the independent living units have access to assisted living and skilled nursing care as the project builds out or must provide an alternate means of providing care.

2. The County supports the development/management entity partnering with local providers of assisted living and skilled nursing facilities to meet the changing needs of residents of independent living retirement housing projects, as the project builds out.

Design Policies

1. The County seeks to foster a sense of community through the layout and design of buildings, open space and community amenities and services within all forms of retirement communities. Variations in unit type, lot size, site layout and architectural design should promote design diversity while ensuring an integrated character for the project as a whole. Smaller lot sizes are generally encouraged to minimize exterior maintenance.

2. A hierarchy in outdoor spaces should be used to serve as focal points within communities and neighborhoods, create outdoor gathering spaces and define the transition between the public and private realms.

3. Retirement communities should be integrated to the extent feasible into the physical fabric of surrounding communities, existing and planned, through site layout, building orientation, architectural design, scale, massing, exterior detail, landscaping and shared open spaces.

4. To avoid the appearance of an institutional use, retirement housing in the form of multi-level structures and similar buildings associated with assisted living facilities and skilled nursing facilities should be designed in a manner that breaks down the mass of building(s). Where this is not possible, façade treatment and exterior detailing should relieve extensive blank surfaces. Landscaping, buffering and layout of common and green spaces may further minimize incompatibilities with surrounding low-density residential and non-residential developments.

Amenities and Services Policies

1. The various forms of retirement communities shall meet the following criteria:

    a. The development ensures the provision on-site or within a safe and convenient distance the following amenities and services:
        i. Private clubhouse with meeting rooms and recreational facilities;
        ii. Retail uses in direct support of the development (i.e. grocery/convenience store, pharmacy, medical services, barber shop, beauty shop, personal care facilities, eating and drinking establishments, bank, business services, laundry, cleaners, and other similar retail uses);

iii. Health or fitness center; and
iv. Active recreation space

b. The development shall ensure that recreational, cultural, and educational facilities (i.e. golf course, religious facilities, medical care facility, and passive recreation space) for the use of residents, employees, and their guests are available on-site or within 10 miles of the site.

c. The development shall ensure access to amenities and services through alternate modes of transportation such as pedestrian access, bicycle facilities and public and/or private mass transit facilities such as mini-bus or shuttle services.

d. The development is adequately served by public water and wastewater utilities.

2. The County encourages that commercial retail and service uses proposed as part of retirement communities, but not located internal to the community, be available for public use and designed in a manner that integrates the retirement community with surrounding neighborhoods.

Transportation Policies

1. All new proposals for retirement communities shall demonstrate that safe and convenient pedestrian (sidewalks or trails) and/or bicycle facilities exist or will be in place when senior residents move into the development to connect the proposed development with amenities and services available within reasonable distances in the surrounding area. Where developments are constructed in phases, the County seeks the concurrent development of pedestrian and bicycle facilities within these phases.

2. All new proposals for retirement communities shall integrate transit facilities such as shuttle or mini-bus service and/or work with local and regional transit authorities/providers not limited to Loudoun Transit and the Northern Virginia Regional Transit Authority, to ensure seniors access to local and regional amenities and services.

3. Working in collaboration with the Virginia Department of Transportation, the Metropolitan Council of Governments and agencies such as the American Association of Retired Persons, the County will review and amend as necessary the Revised Countywide Transportation Plan to ensure accommodation of the transportation and mobility needs of senior populations.

4. Retirement communities or other uses, public and private, that cater to seniors shall include in their designs covered bus shelters with seating or covered space for seniors to congregate near building entrances or other such locations while they wait to board buses, shuttles and other such mass transit facilities.

In-Home Care and Assistance Policies

1. The County will support private sector efforts aimed at assisting seniors who wish to live in their own homes through the provision of technical assistance, etc. This is intended to facilitate the adequate and timely provision of services such as in-home care and assistance, home rehabilitation and remodeling to address the changing needs of Loudoun's senior population and enable them to age in their own homes.

2. The County will review and revise its regulatory documents as appropriate to offer seniors opportunities that may enable them to age in their own homes such as allowing second kitchens within single-family homes for caregivers.

Definitions to be added to the General Plan Glossary:

Active Adult Retirement Housing: Active adult retirement communities offer a form of housing most similar to traditional residential development. This housing type is tailored to the specific interests and desires of seniors and reflects a lifestyle choice. These communities offer an independent living environment with houses often designed to reduce maintenance requirements and cater to specific interests of the senior home buying market. Restricted to seniors above a certain age, these communities offer amenities and services tailored to this age group. These active-adult age-restricted communities cater to seniors seeking a living environment among similar age groups who share like interests and have the necessary leisure time. Such active adult dwelling units may also be found in age-targeted communities where they commingle with traditional family housing.

Assisted Living/Board and Care: Assisted living facilities (ALF), often also known as residential care, board and care, personal care, congregate care or sheltered living facilities, are facilities designed for the care of seniors. These facilities provide varying degrees of personal care, assistance and support services to seniors who need help with daily activities (dressing, bathing, grooming, administering medication) and do not require skilled medical/nursing care.

Levels of care and service vary widely with most communities typically providing meals, laundry and housekeeping. The scale and type of facilities also vary with facility size ranging anywhere between 20 to 200 units, in a single-family home to an apartment style building. Assisted living facilities may also occur individually or in conjunction with/as part of a continuing care retirement community or life care community.

One of the most distinguishing features between ALFs and congregate housing is that services such as housekeeping are offered in the former more as a necessity and in the latter more as a convenience for independent residents. Many states impose licensing requirements on facilities where a higher degree of physical care is provided such as assistance with personal hygiene or medical management would often trigger licensure requirements rather than transportation facilities or housekeeping services such as linen and laundry.

Congregate Housing: Historically congregate housing referred to a group living environment which offered a degree of care and assistance to seniors who needed some assistance but were for the most part capable of independent living. These services were intended to return the seniors to a semi-independent lifestyle while providing them with necessary social contacts and were primarily intended to prevent premature institutionalization.

Today, congregate housing refers to a form of independent group living where seniors live independently, but in a multifamily structure, sharing common areas, amenities, services and other social activities. Most of their meals are taken in common dining facilities. A higher degree of personal care or assistance is typically not provided in this form of housing. Individual residential units are usually apartment style units, and many offer seniors the option of designing/adapting the unit to facilitate senior living such as wheelchair accessibility.

As congregate housing developments typically do not offer long-term care commitments such as in life-care communities and continuing care retirement communities, there are no high upfront financial commitments. Often these units are rented, rather than sold and this makes them an affordable relatively short-term investment for seniors looking for the advantages of group living with independent units.

Continuing Care Retirement Communities: Designed to allow seniors the option to 'age-in-place', Continuing Care Retirement Communities (CCRC), also known as Life Care Communities, offer a continuum of care. Predominantly comprised of independent living units, these communities include supporting assisted living and skilled nursing facilities. Designed as residential campuses, they guarantee residents lifelong care and residence, unlike other forms of retirement housing. Seniors typically move into independent living units and if a higher degree of health care is necessary they are able to move into the assisted living or skilled nursing facility, on a temporary or permanent basis, without having to move out of the community to obtain the needed care.

Home Care and Services: Home care services are often offered within an individual's home by private home care agencies. Service levels may be tailored to the needs of the individual and offered on an hourly, daily, weekly or monthly basis. Service may also be intensive enough to be offered on a continual basis up to 24 hours a day. Home care services are often a more cost effective alternative to expensive hospital care or extended periods of stay in an assisted living or skilled nursing facility. This option is often amenable to seniors who wish to stay in their homes and live independent lives rather than move to a retirement community or assisted living facility.

Hospice: Hospices are designed to provide physical and emotional support to individuals in the final phase of a terminal illness. This form of specialized care seeks to enable patients to spend their last days with dignity and as comfortably as possible. Hospice care can be made available in several settings: in the privacy of an individual's home, in an assisted care or skilled nursing facility or in a hospice facility.

Skilled Nursing Facilities: Nursing homes, nursing care facilities and convalescent homes are state licensed and regulated facilities that offer elderly persons a higher level of skilled medical care with round-the-clock nursing services. These facilities offer in addition to room and board, personal and medical care and are typically more expensive than assisted living facilities on account of the higher degree of care made available. These facilities are required to be individually certified by the State for Medicare and Medicaid and accept several payment options including Medicare, Medicaid, private insurance carriers and private funds.

Nursing facilities often offer multiple levels of care, from basic care to higher degrees of skilled care. Basic care level is intended to assist a resident with daily activities pertaining to personal care, mobility, and hygiene to maintain the overall health of the resident in a supervised environment. Higher degrees of skilled care require the services of registered nurses and service levels may vary from regular periodic treatments and procedures to comprehensive in-patient care designed for someone with an acute illness, disease or injury.