

# LEVERAGING HIGHER EDUCATION INSTITUTIONS FOR URBAN ECONOMIC DEVELOPMENT AND REVITALIZATION

MAINE COLLEGE OF ART & DESIGN





Source: WNYC



Source: Boston Globe



# CONTEXT

**Total Population: 68,400**

**Higher Education Institutions: 5**

**Student Enrollment: 10,043**

University of New England | 1,247 students

Roux Institute at Northeastern University | 500 students

University of Southern Maine | 7,583\* students

Roux Institute at Northeastern University

Maine College of Art & Design | 453 students

University of Maine School of Law | 260 students

*\* USM enrollment not divided by campus location. Students take courses on multiple campuses.*

# UNIVERSITY OF SOUTHERN MAINE RECENT PROJECTS

## ROOTED IN PORTLAND



### **McGoldrick Center for Career & Student Success**

USM Overlay Zone  
Total Development: 42,000 SF  
Student center  
Dining hall  
One-acre quad



### **Portland Commons**

USM Overlay Zone  
Total Development: 210,000 SF  
5 stories  
580-bed (385 units) residence hall  
2<sup>nd</sup> largest passive house building at a university in U.S.



### **Crewe Center for the Arts**

USM Overlay Zone  
Total Development: 40,000 SF  
Osher School of Music | Art gallery  
200 seat performance hall



# UNIVERSITY OF SOUTHERN MAINE RECENT PROJECTS

ROOTED IN PORTLAND



JULY 2018



JULY 2023

# UNIVERSITY OF NEW ENGLAND RECENT PROJECTS

## EDs & MEDs ON STEVENS AVE



Under Construction 2023

### Harold & Bibby Alfond Center for Health Sciences

Total Development: 110,000 sf  
College of Osteopathic Medicine  
Maine's only medical school



INNOVATION FOR A HEALTHIER PLANET

### UNE Institutional Overlay Zone (IOZ)

#### Regulatory Framework

Under Review

### UNE IOZ

70-acre campus

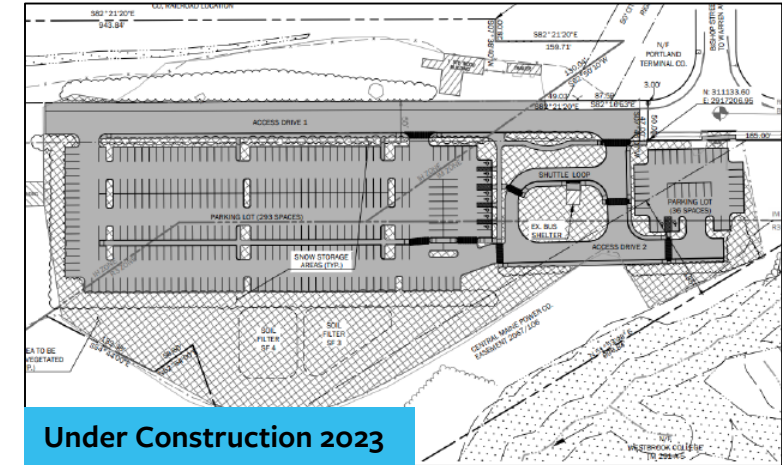
Project priorities

- Short term (0-5 years)
- Mid-range (5-10 years)
- Long term (5-20 years)

Programming

Design

Ongoing community engagement



Under Construction 2023

### Intermodal Transportation Facility & Connector Road

344 Parking spaces

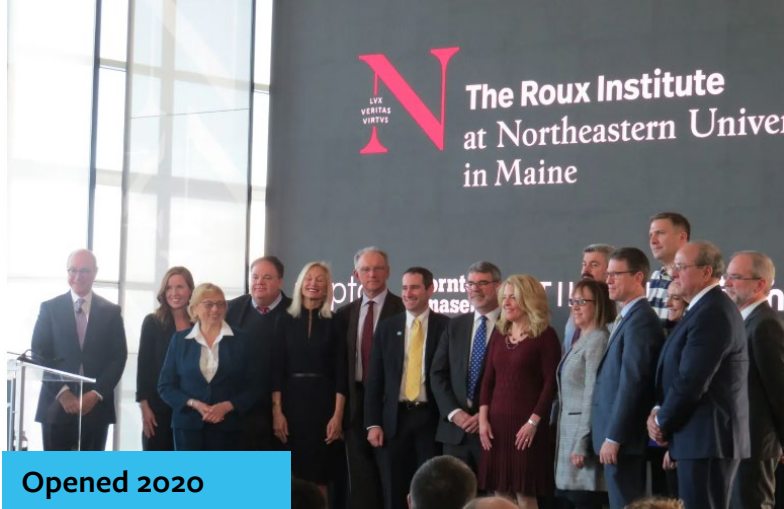
72 EV chargers

New internal connector road



# ROUX INSTITUTE AT NORTHEASTERN RECENT PROJECTS

SUPPORTING A 21<sup>st</sup> CENTURY ECONOMY



Opened 2020

## 100 Fore Street

B6 Eastern Waterfront Zone  
44,000 SF waterfront campus  
WEX, Inc. Headquarters



IOZ Adopted 2023

## Roux IOZ

Regulatory framework (zoning)  
Institutional Development Plan  
Project Priorities

- Short term (0-5 years)
- Mid-range (5-10 years)
- Long term (10-20 years)

Programming

Design

Ongoing community engagement



Phase I under review

## 1 Bean Pot Circle | Phase I

Roux IOZ

Total Development: 538,000 SF

New academic building

Adaptive reuse of Landmarked Bean Building

Public open space

Replacement of pier

# UNIVERSITY OF MAINE LAW SCHOOL RECENT PROJECTS

## DOWNTOWN RISING

**MAINE**  
UNIVERSITY OF MAINE SCHOOL OF LAW  
**LAW**

UNIVERSITY OF MAINE  
**GRADUATE &  
PROFESSIONAL  
CENTER**

1865 THE UNIVERSITY OF  
**MAINE**  
GRADUATE SCHOOL OF BUSINESS

ONLINE OR IN-PERSON, OUR TOP-  
RANKED MBA MOVES YOU FORWARD

PORTLAND GATEWAY  
1865 THE UNIVERSITY OF  
**MAINE**

### Maine Law – 300 Fore Street

Total Redevelopment: 64,000 SF  
Proximity to courthouses, law firms, &  
businesses



Complete 2023

*Photo credit: Blind Dog Photo Associates*



# MAINE COLLEGE OF ART & DESIGN

## DOWNTOWN RISING

### **Porteous Building Renovation | 1993**

B-3 Downtown Business zone

Congress Street Historic District

Contributing building

2016 Economic Development Achievement Award

Downtown Housing:

- Oak Street
- Shepley
- Erlang
- Monument Square



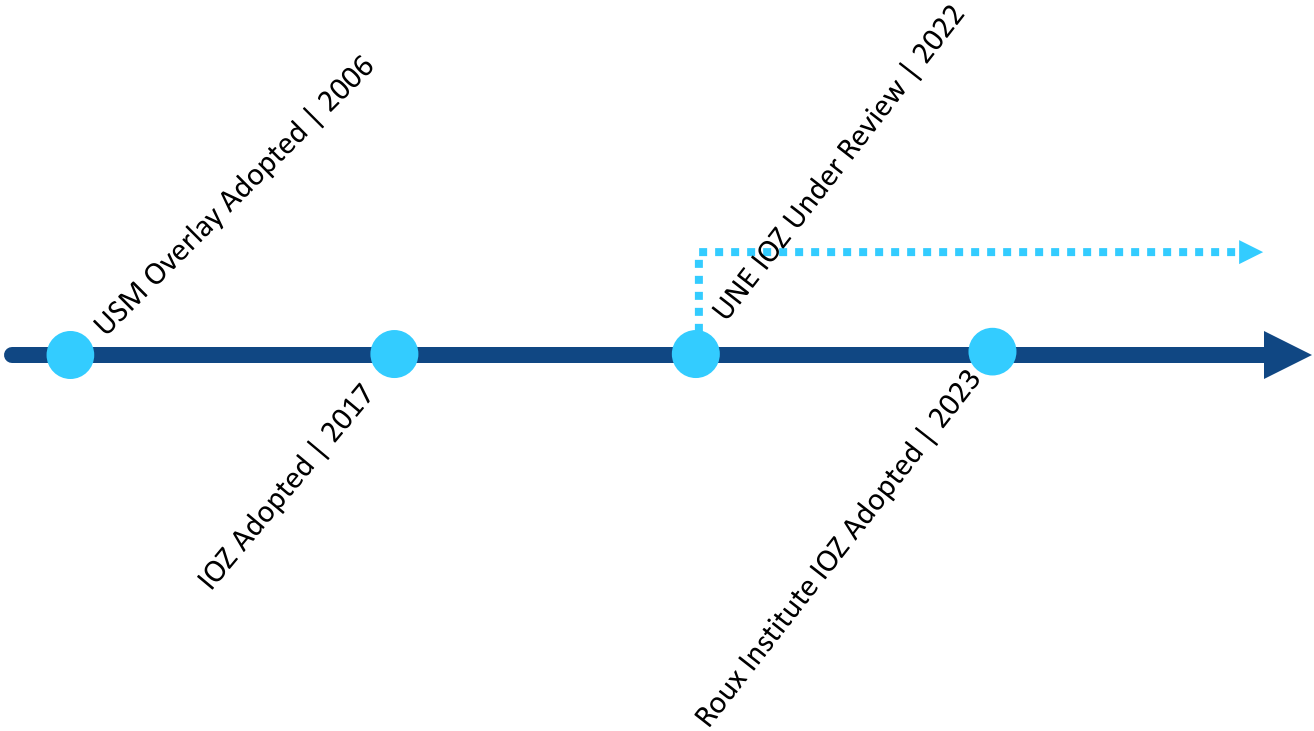
# REGULATORY MECHANISMS FOR INSTITUTIONS

## 1. Institutional Overlay Zone (IOZ)

- University of Southern Maine
- University of New England (In Progress)
- Roux Institute at Northeastern University (Adopted 2023)

## 2. Overlay Zones

- University of Southern Maine (Adopted 2006)
- Waynflete School



### 8.10 UNIVERSITY OF SOUTHERN MAINE OVERLAY

#### 8.10.1 Purpose

The intention of the University of Southern Maine Overlay Zone is to establish an overlay zone in which an existing university campus can be continued and reasonably expanded within defined boundaries, in addition to those uses permitted in the underlying zone or zones. The purpose of this section is to recognize the unique qualities of a university campus while at the same time protecting the value and integrity of established neighborhoods.

#### 8.10.2 Location and applicability

The University of Southern Maine Overlay Zone is intended to encompass and define the University of Southern Maine campus west of Forest Avenue. Properties in the University of Southern Maine Overlay Zone shall continue to be governed by the regulations applicable to the underlying zone except as specifically modified by this section.

#### 8.10.3 Permitted uses

- A. In addition to the permitted uses allowed in the underlying zones and notwithstanding anything to the contrary in the use regulations for the underlying zones, post-secondary schools and university uses are permitted in the University of Southern Maine Overlay Zone, including, but not limited to:
1. Classrooms.
  2. Laboratory and research facilities.
  3. Student unions.
  4. Dining halls.
  5. Bookstores.
  6. Auditoriums.
  7. Concert and lecture halls.

8. Gymnasiums.
  9. Libraries.
  10. Outdoor use areas, such as “quads”, greens, parks, gardens, art installations, and other active and passive noncommercial recreation spaces.
  11. Faculty and student housing.
  12. Parking lots and garages.
  13. Community meeting spaces.
  14. Administrative and faculty offices.
  15. Transportation facilities.
  16. Maintenance facilities.
  17. Utility buildings.
  18. Student health services.
  19. Daycare facilities, nursery schools and kindergartens operated in conjunction with university programs or serving students, faculty or employees of the university and their families, with associated outside play areas.
  20. Other buildings, structures and uses customarily incidental to a university.
- B. On lots fronting on Chamberlain Avenue and Exeter Street, university uses shall be limited to faculty housing, graduate student housing, faculty offices and administrative offices, and buildings containing such uses shall be designed and maintained so as to complement the residential character of the street as required in Subsection 8.10.9
- C. No change of use permit shall be required for any of the above uses in actual existence as of the date of enactment of the University of Southern Maine Overlay Zone.





# INSTITUTIONAL OVERLAY ZONE BACKGROUND

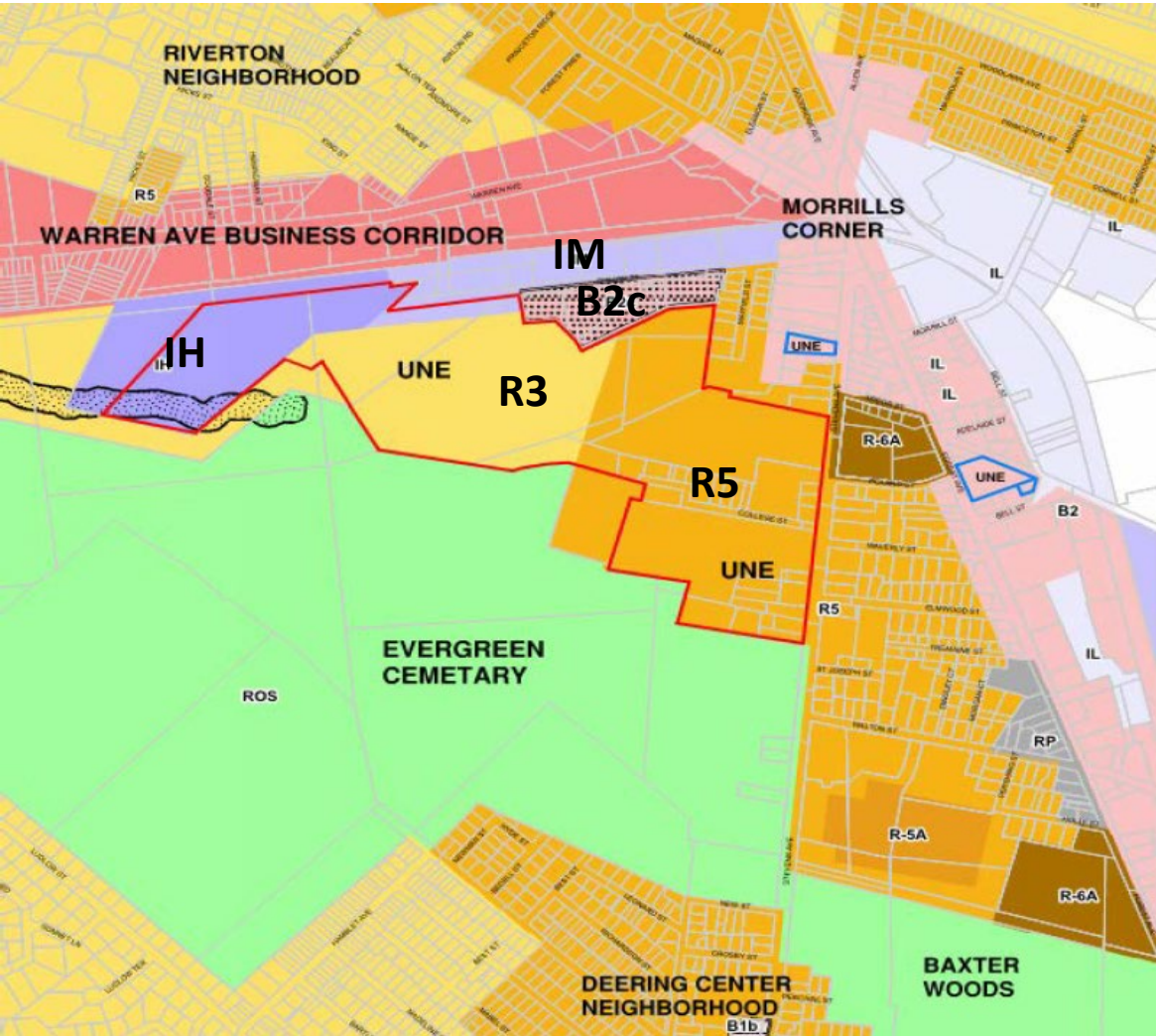
- Adopted in 2017
- City's four major institutions:
  - Maine Medical Center
  - Mercy Hospital
  - University of Southern Maine
  - University of New England
  - *Roux Institute at Northeastern University (added in 2023)*
- Institutions were considering major changes & expansions
- Existing zoning context presented challenges
  - MMC contract zone (2005) did not support their long-term vision
  - UNE's existing zoning consisted of 5 disparate zones

## What problem are we trying to solve?

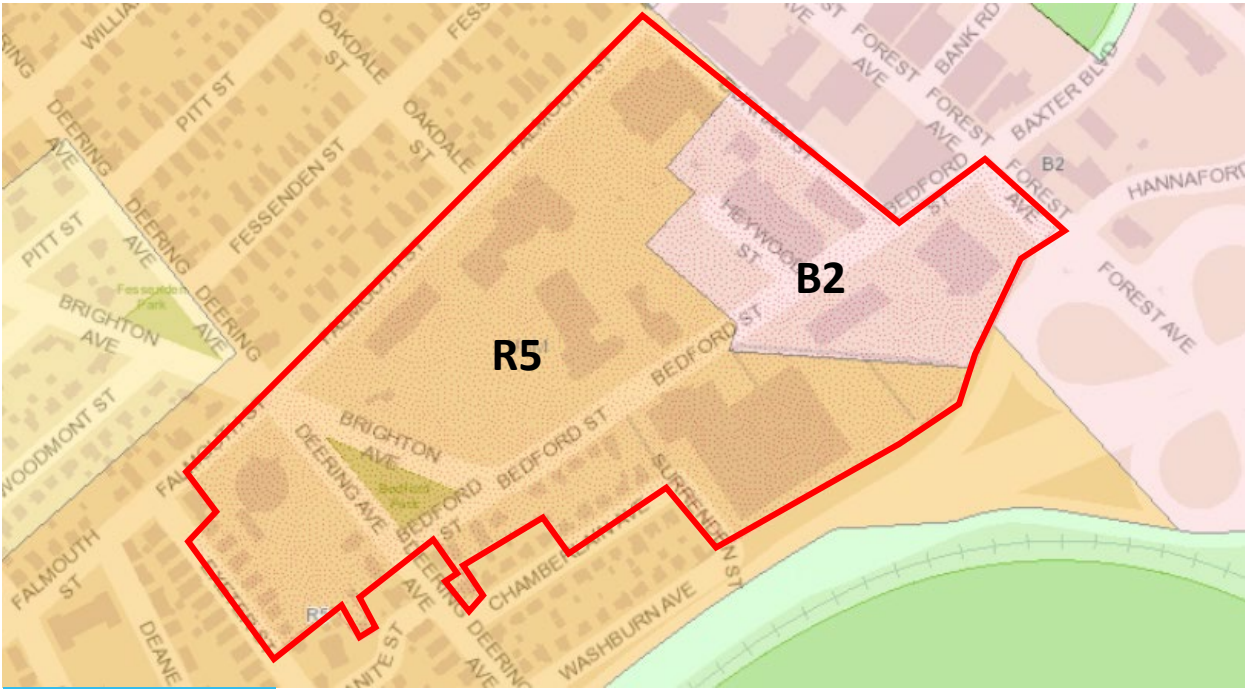
- Lack of clarity & predictability in our growth management approach
- Disparate regulatory approaches
- Community concerns/Need for improved communication
- Lack of data
- Limited understanding of long-range planning
- Most of all – improved partnerships



# INSTITUTIONAL OVERLAY ZONE BACKGROUND



UNE ZONING



USM ZONING



# INSTITUTIONAL OVERLAY ZONE BACKGROUND

## What are the goals

- Clear & Predictable growth management structure for major institutions.
- More transparent and defined mechanism for understanding and addressing community concerns about institutional expansion.



Source: University of New England

# BACKGROUND – RESEARCH | OUTREACH





# INSTITUTIONAL OVERLAY ZONE

## An IOZ is

- Created for higher education and medical institutions
- Regulatory tool that requires proactive planning
- Zoning framework to support & facilitate consistent, predictable growth
- Requires analysis of future impacts
- Includes monitoring requirements
- Requires ongoing public engagement

## An IOZ is not

- Approval of a specific development
- Site plan/subdivision application
- Traffic Movement Permit
- Transportation Demand Management Plan
- Granting approval to build
- Requiring anything to be built
- Restricting non-institutional development

# INSTITUTIONAL OVERLAY ZONE COMPONENTS

An IOZ includes three components:

1

## IOZ Map Amendment

Establishes the IOZ boundary.

2

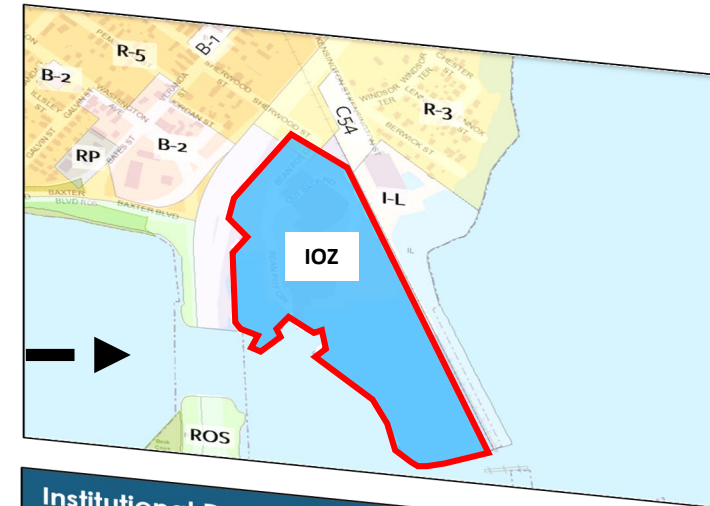
## Institutional Development Plan (IDP)

An IDP serves as a master plan for an institution in the short-, mid-, and long-term documenting current and anticipated conditions.

3

## Regulatory Framework

To implement the vision of the IDP, the Regulatory Framework supplements the existing base zoning through use, dimensional and design requirements, as well as specify the process for monitoring reports & amendments to the IDP & Regulatory Framework and neighborhood integration.



**D. Dimensional requirements.**

1. Applicability  
All principal buildings and structures located within the IOZ and located on land owned or leased by the Roux Institute shall be subject to the dimensional requirements of the underlying zone, except where modified by the provisions of this Section.

Table 8-1: Dimensional Requirements	
Building height (max.)	Maximum building heights for new principal buildings in the IOZ shall be governed by the Roux IOZ Height Map (Figure 8-F)

2. Rules of Measurement  
**Publicly accessible corridor:** A corridor accessible to the general public that is open to the sky or enclosed with a minimum width of 20 feet. Enclosed portions of publicly accessible corridors shall have a minimum height of 30 feet.  
**Street wall:** Within the Roux IOZ the term "street wall" shall mean a wall or portion of a wall that includes the principal entry to a building facing a street, public right-of-way, major pedestrian access routes, or open spaces. Orientation of the principal entry to a building shall be determined by the applicant.
3. Minimum and maximum street wall heights  
New principal buildings in the IOZ shall rise to a minimum street wall height of forty-five feet (45'), and may rise to a maximum street wall height of one hundred and five feet (105').

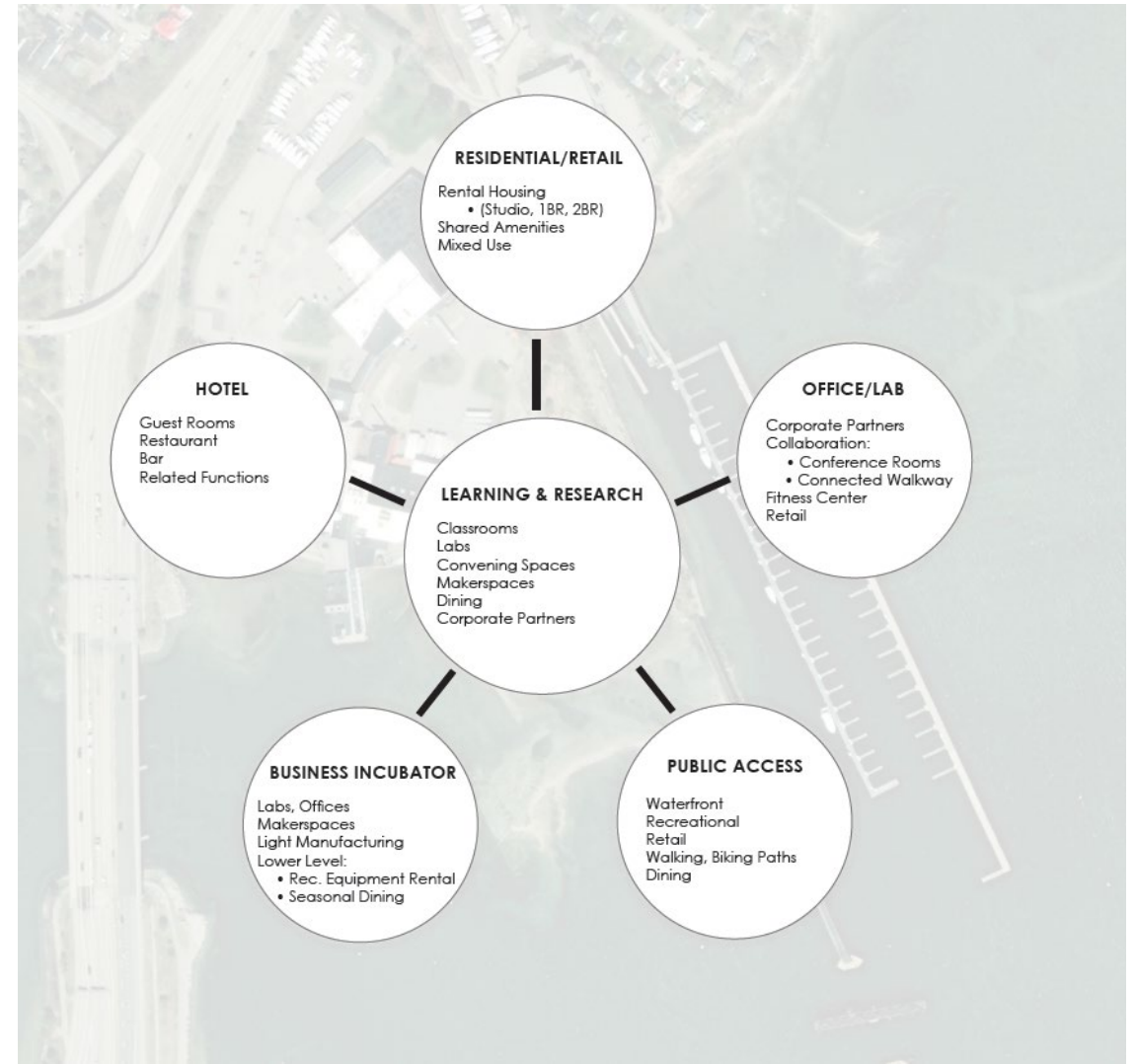


# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ



# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ

- Adopted by City Council in 2023
- 1<sup>st</sup> higher education institution in Portland to create an IOZ
- Elements of Roux IOZ:
  - Institutional Development Plan (IDP)
  - Zoning requirements (Regulatory Framework)
    - uses
    - design standards,
    - dimensional requirements
    - height overlay map
- Neighborhood engagement strategy





# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ

- **Regulatory Framework Content:**

- A. Applicability
- B. Phasing and Monitoring
- C. Additional Permitted Uses
- D. Dimensional Requirements
- E. Transportation
- F. Environment
- G. Mitigation Measures
- H. Design Standards
- I. Neighborhood Integration
- J. Historic Preservation

**Institutional Development Plan**  
Roux Institute Campus  
November 2022



- Structured around the institution's vision and mission
- Includes baseline data
- Assessment of future growth
- Analysis to anticipate future impacts

**IDP informs the regulations in the regulatory framework & frames subsequent site plan reviews.**

# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ

## Key Content

- Added 3 permitted uses
- Hotel Limitations

Add Permitted Uses
Laboratory and research facilities
Low-impact Industrial (>10,000 SF)
High-Tech Manufacturing

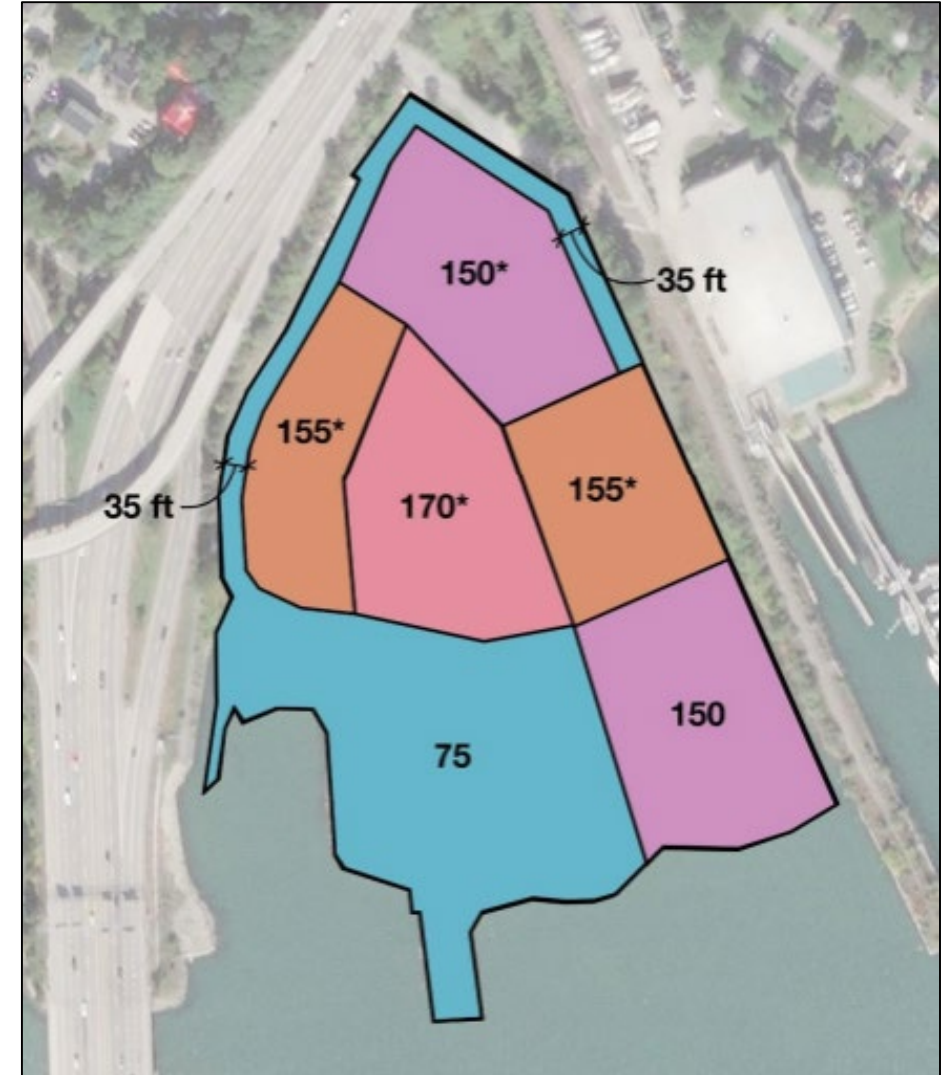
Hotel Limitations
No more than one hotel within IOZ boundary
No more than 130 rooms
No more than 8 stories tall



# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ

## Key Content

- Adds 3 permitted uses
- Hotel limitations
- **Establishes Height Overlay Map**
- **Additional Dimensional Standards**
- **Design Guidelines**



# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ

## Key Content

- Adds 3 permitted uses
- Hotel limitations
- Establishes Height Overlay Map
- Additional Dimensional Standards
- Design Guidelines
- **Environment:**
  - Adds 3 acres of public open space
  - Creates Sustainability & Resilience Charter
  - Design for Flood Resilience
  - Utilizing bird safe design strategies





# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ

## Key Content Continued

- Transportation
  - Identifies transportation requirements to accompany future development proposals, such as TDM and TMPs
  - Identifies trip (37%) and parking (20%) reduction targets
  - Identifies TDM strategies to be employed
  - Incorporates Bike and Pedestrian access
  - Site circulation plan and connectivity
  - Identifies potential mitigation measures



# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ

## Key Content Continued

- Neighborhood Integration
  - Host neighborhood forums (quarterly basis)
  - Maintain Roux Institute website
  - Establish Community Advisory Group (quarterly meetings)
  - Designate community contact
  - Regular outreach to interested stakeholders





# ROUX INSTITUTE AT NORTHEASTERN UNIVERSITY IOZ



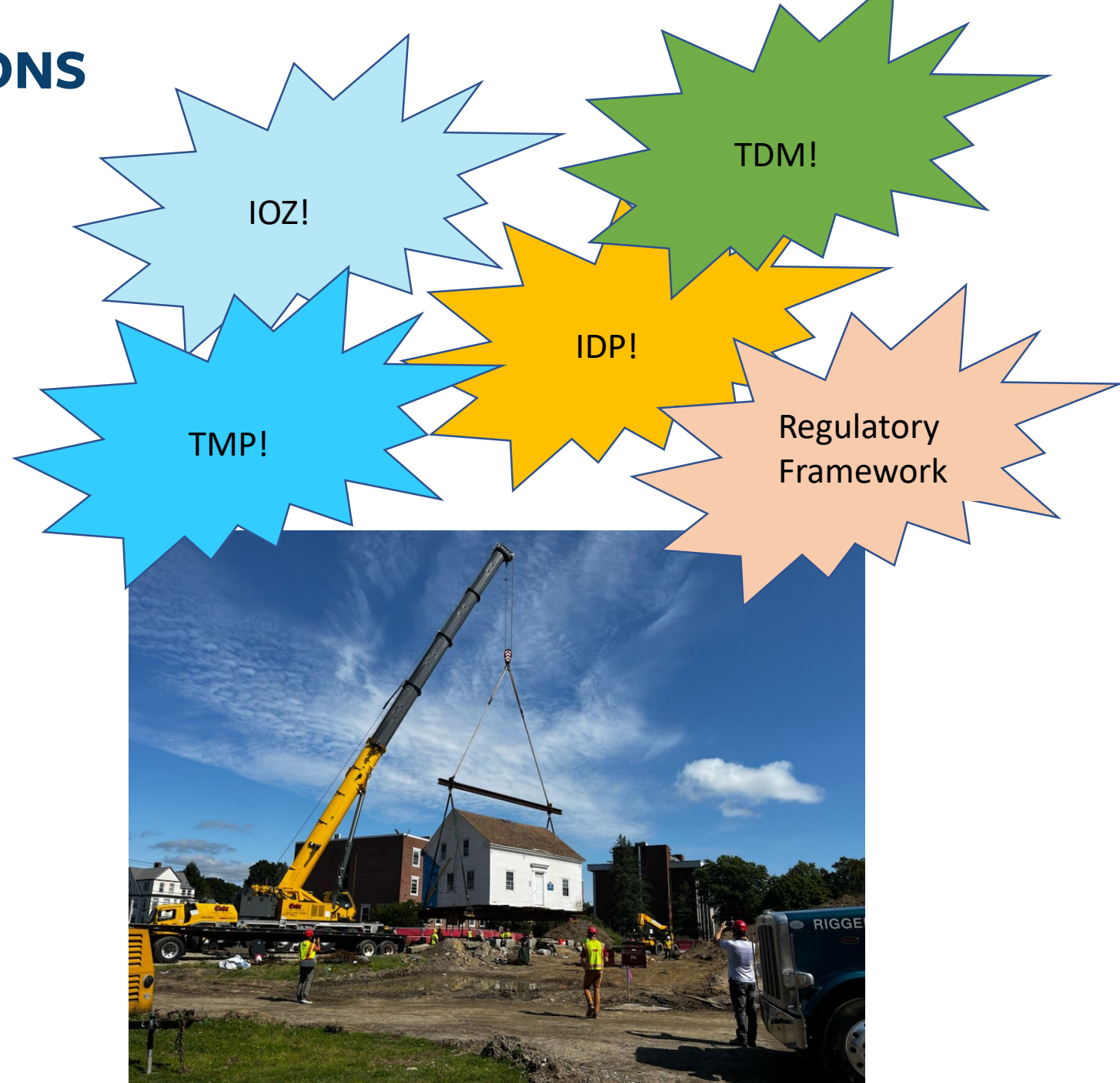
- Pedestrian
- Bike/Pedestrian
- Water Taxi
- Potential Shared Use Path Connection
- Vehicular
- Primary Entrance
- Potential Off-Ramp

Development Plans are conceptual and intended to illustrate how design guidelines and principals could potentially be implemented at this site.



# CHALLENGES & CONSIDERATIONS

- Terminology associated with IOZ is a challenge
- Setting expectations
  - Transportation mitigation
  - Open space
  - Building design
- Why IOZ?
- Changes and amendments process
- Right, Title, and Interest
  - Partnerships
- Clear zoning
- Tensions (town gown relationship)
- Long-term community engagement
  - Who should be involved
  - Oversight
- Transparent process
- Encourages long-range planning
- Mitigate community fears





# PANELIST

Kevin Kraft: Deputy Director, City of Portland Planning & Urban Development

Christine Grimando: Director, City of Portland Planning & Urban Development

Mary Costigan: Bernstein Shur

Liz Kohler: Managing Director of Partnerships Roux Institute at Northeastern

Andy Osheroff: Director Career & Employment Hub University of Southern Maine



planning  
& urban  
development







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# REGULATORY MECHANISMS FOR INSTITUTIONS

Institutions	Current Zoning	Institutional Overlay Zone Eligible	Historic Designation
MECA&D	B-3 Downtown Business	No	Congress Street Historic District
Univ. of Maine Law	B-3 Downtown Business	No	
Univ. of Southern Maine	USM Overlay Zone	Yes	Deering Farmhouse
Univ. of New England	R3, R5, B2, IM, IH	Yes <i>(IOZ in progress)</i>	Westbrook College Historic District
<b>Roux Institute at Northeastern</b>	<b>Roux Institutional Overlay Zone</b>	<b>Yes</b>	<b>B&amp;M Landmark</b>