

Saratoga Retirement Community
Residents' Association Expansion Sub-Committee

Report on the SRC Expansion Survey

Appendix 3, Questionnaire and Attachments

Questionnaire Cover letter

SRC Residents' Council

Dear Fellow SRC Residents:

As you know, the Odd Fellows Home of California faces some serious deliberations about the future size and configuration of our campus. Your Residents' Council has now decided to find out how current residents think and feel about different options for the expansion of the SRC campus. This information will allow the Council to represent the residents' views more fully. The attached questionnaire has been prepared for giving all residents a voice in this important matter, and your Council much appreciates your participation; only with a substantial return rate will the results of this survey gain enough weight and insight.

The questionnaire is included with this letter (on pages 1 and 2) and should be filled out legibly by hand; it comes to you in an envelope with your name on it. After completing the questionnaire, please sign the envelope (*not* the questionnaire!) and use it to return the questionnaire to one of the boxes available in the Manor (near the cubbies), the Pavilion Lobby (table under the window), the Assisted Living Building (ground floor near elevator and second floor on puzzle table), or the HCC. Questionnaires and envelopes will be kept separate throughout the tabulation process to protect the anonymity of all respondents. **In order to be included in the results of the study, all questionnaires need to be returned by 5 pm on November 8, 2021.**

Many of you have already informed yourselves about current expansion proposals through meetings, websites, and information materials. To refresh your memory, we have included in this package three summary statements (on pages A through E) that are relevant to potential expansion. You may find them useful, but they are not required reading for completing the questionnaire. Links to relevant websites are included in these summaries.

With thanks for your cooperation,

Bev Lenihan
President, Residents' Council

Questionnaire

Residents Survey on SRC Expansion - QUESTIONNAIRE

As we look at a future expansion of SRC, what do you think are the most important priorities the expansion should accomplish (please rank as many as **five** of the following, including your own additions to the list – please mark your highest priority with a “1”, etc., through “5”):

Rank

- ___ To significantly improve the facilities for skilled nursing
- ___ To preserve the natural environment of the SRC campus
- ___ To assure the long-term financial viability of SRC
- ___ To make sure that facilities for serving a larger resident population (dining, fitness, open-air activities, meetings, walking, library) are adequate
- ___ To solve the parking problems on the campus
- ___ To bring the available facilities (Independent Living, Assisted Living, Health Care Center) in line with future (internal and external) demand

Enter (and rank) additional priorities of your own:

___ _____

___ _____

___ _____

2. How do you feel about the expansion plan proposed by the **PRS** management company? (Please check only one) (Please see attached 2-page summary, pages **A** and **B**)

- ___ I am strongly in favor of the PRS proposal
- ___ I lean towards the PRS proposal
- ___ I am undecided
- ___ I lean against the PRS proposal
- ___ I strongly oppose the PRS proposal

2.1 Here is the main reason for my choice: _____

2.2 What, in your view, is the greatest strength of this proposal? _____

2.3 What, in your view, is the greatest weakness of this proposal? _____

3. How do you feel about the expansion plan proposed by residents’ “**Preserve SRC**” initiative? (Please check only one) (Please see attached 2-page summary, pages **C** and **D**)

- ___ I am strongly in favor of the “Preserve SRC” proposal
- ___ I lean towards the “Preserve SRC” proposal
- ___ I am undecided
- ___ I lean against the “Preserve SRC” proposal
- ___ I am strongly opposed to the “Preserve SRC” proposal

3.1 Here is the main reason for my choice: _____

3.2 What, in your view, is the greatest strength of this proposal? _____

3.3 What, in your view, is the greatest weakness of this proposal? _____

4. If you have read the comments made by Hugh Roberts (see page E), please check one of the following:

4.1 His ideas are well worth pursuing further _____

4.2 His ideas are not realistic _____

4.3 I do not have enough information to judge _____

5. What additional information would you find helpful in evaluating these three proposals for expanding SRC? (Use back of page for more space)

6. Let us add a few more questions on what you think about the expansion of SRC:

6.1 From my own personal perspective, the greatest benefit for me of a major expansion of SRC would be:

6.2 From my own personal perspective, the greatest downside for me of a major expansion of SRC would be:

6.3 I have some other thoughts on the expansion of SRC. Here they are:

7. We assure you that we will treat the information you are providing in this questionnaire confidentially, but it would help understanding your answers if you tell us where you live at SRC (please check one):

- _____ Manor (Building 1000)
- _____ Building 5000
- _____ Building 4000
- _____ West Cottages
- _____ Cul de Sac cottages
- _____ Assisted Living (Building 2000)
- _____ Health Care Center (Building 3000)

*Please sign the envelope (NOT the questionnaire!), place the questionnaire in the envelope, seal it and drop it off in one of the boxes made available across the campus. **THANK YOU!***

PRS Proposal

Residents' Survey on SRC Expansion – “PRS Proposal”

(Letter from Odd Fellows Home of California Executive Board to SRC Residents, August 30, 2021)

When the Odd Fellows Home of California board embarked on the master planning process in 2017, our goal was to position Saratoga Retirement Community for success for generations to come. Our organization has provided a home to senior adults for over a century. We are committed to carrying on that legacy and believe a forward-looking master plan is necessary to give us flexibility for the future.

We approached master planning with the assumption skilled nursing care will become increasingly expensive to provide while revenue becomes harder to count on. We also believe that future residents will prefer, if not expect, to receive skilled nursing care in private rooms. Downsizing the existing nursing facility by converting semi-private rooms to private rooms solves both issues.

Downsizing the skilled nursing facility will insulate us from risks related to the healthcare sector, but it will also affect overall revenue. We plan to offset that loss by adding 52 independent living residences to campus. Adding units will have additional scale benefits and also help cushion us during occupancy shocks.

But the question of where to place 52 new residences has been difficult for the board, PRS Management, and our community. We all want to preserve what makes SRC unique, including the open acreage and especially the historic Manor building. That said, the constraints of regulations and financial feasibility limit where on campus we can build.

Our board is part of a fraternal organization steeped in tradition. Because of this, we have a strong bias toward preserving history. But we also recognize that preservation is only possible if the organization survives. Therefore we are now willing to develop areas of our campus that we might have once considered off-limits because there is no single part of SRC that is more important to us than the whole.

After considering various alternate expansion configurations, including the plan proposed by a group of residents, the board has decided to continue the entitlement process on the master plan that has already been submitted to the City of Saratoga. We feel that this plan is the most feasible of all options and, if the city approves it, it will give us the flexibility we need to navigate the future. We appreciate the ideas residents have presented and recognize the virtues of the plan proposed. However, that resident plan would require tearing down our existing skilled nursing building. Demolishing this building would displace residents and eliminate nursing revenue without an immediate offset, neither of which is acceptable to the board. Further, the proposed replacement building would require operating two separate floors of skilled nursing. A two-story building would impose more expense and operational risk than we have today with our single-story configuration.

Though the board has agreed to proceed with the entitlement process already underway, all stakeholders, including PRS Management, should remember that the board has not authorized any construction. The current process is just about securing entitlements from the City of Saratoga. There are several significant steps between entitlements and construction, and board authorization is required all along the way.

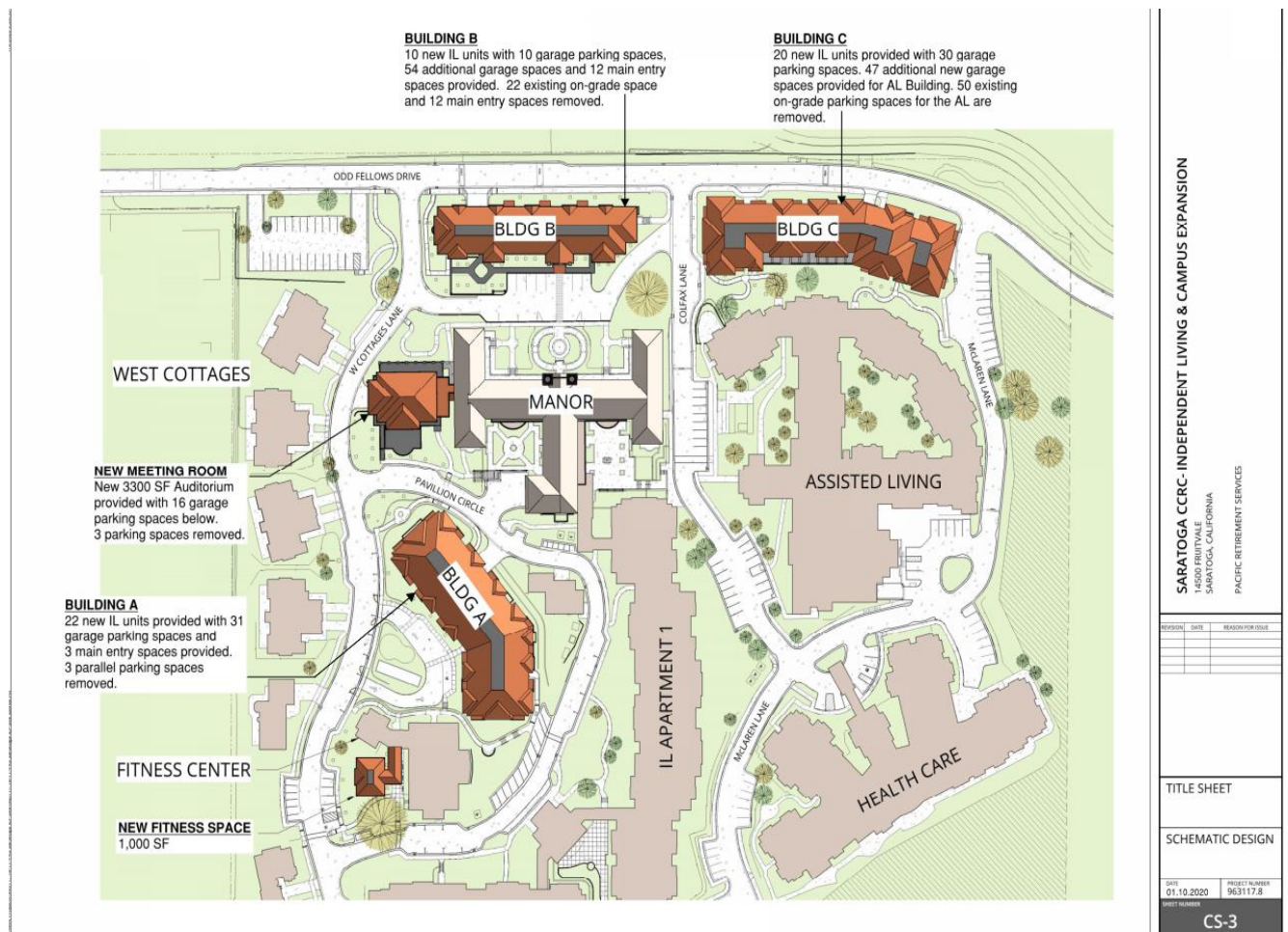
We have heard the clear message that preserving open spaces is highly desired by current residents. Please know that the board is willing to not to authorize the construction of building A, located in what is now Odd Fellows' Park, for at least seven years after the city approves the master plan. While this moratorium would not be permanent, we hope it would provide current residents confidence that this space will remain open for most of the next decade.

What is now Saratoga Retirement Community was once home to 150 aged Odd Fellows, their widows and orphans, and Rebekah's. Where residences sit today, orchards used to blossom. The 1912 version of Saratoga Retirement Community would be almost indistinguishable to today's residents and vice versa. The one constant between then and now has been the Odd Fellows' commitment to providing care and comfort to our seniors. That commitment remains steadfast, and we thank you for choosing to live here. We are proud to serve on this board, and we are confident that the ability to add residences and future residents to this special community is the right direction for the organization. The board looks forward to additional work with the City of Saratoga and its next steps in our master plan entitlement.

(Signed: Terry L Olson, Chairman; Gerald Poarch, Vice Chairman; Betty Rasor, Secretary; Roy Steel, Treasurer)

[For further information, see documents in *My Saratoga > Our Community > Master Planning Presentations*]

Map of new buildings proposed in PRS Expansion Plan (2000)



Preserve SRC Alternate Plan

Residents' Survey on SRC Expansion – “Preserve SRC Campus” Proposal (9/22/21)

Just what is the Residents' Alternative Plan? It is an alternative, superior to the PRS proposal for the expansion of SRC. It has been submitted to the City of Saratoga for consideration in the Environmental Impact Report of the PRS plan. Over 60% of Independent Living residents have already indicated that they support the Alternative Plan. Fundamentally, it provides a way to enlarge SRC, while preserving our beautiful and quiet campus. It is a way to *reasonably* expand, while at the same time allowing for rational growth in IL occupancy and revenue to keep this historic campus properly maintained and improved for years to come.

SRC's big advantage is its semi-rural setting, and bucolic ambiance. Its green lawns, historic trees, and open-air recreational area are well worth conserving. The Residents' Alternative Plan accommodates the needed changes that must be made to SRC, while at the same time preserving the quality of life we enjoy here today.

Challenges facing SRC: Too few IL units to provide money needed long-term. The Preserve team's plan adds 52 new IL units to generate needed income to sustain the campus, keeping it modern, pleasant and meeting customer expectations in years to come. Skilled Nursing Facility too big & outmoded. Demand for skilled nursing beds calls for private rooms & ensuite baths, not today's 2-bedded rooms & communal showers. Residents need and deserve a new, modern Skilled Nursing Facility now and not the piecemeal, re-model project taking years to accomplish that PRS plans. The Preserve team's right sized, modern SNF is to be located next to the new Emergency Exit on Odd Fellows Dr. for quick evacuation of nursing home patients. [see map]

We don't need infill development, sprawling 5 buildings all over campus. The outmoded Health Care structure can be demolished and replaced by a new apartment building with desirable IL units, an auditorium, sitting on the footprint of the old HCC, but now having a full basement of parking. Today's HCC would continue operation until the new SNF is completed and only then will residents be transferred to the new facility before the old HCC is demolished. Throughout this entire period nursing revenue continues without a break and no residents are displaced.

Our proposed 2-story modern SNF has the same number of nursing stations [2] as today's HCC, assuring good response times and proper patient care. The new design has dining and therapy on both floors, so patients do not have to be moved between levels. An on-site kitchen and dumb waiter will provide hot food, which is a vast improvement to running food over from AL that we now have. Finally, operational risk is greatly reduced by having an SNF with abundant access/egress and being sited adjacent to the new Emergency Exit.

In addition to providing a modern Nursing Home, the **big advantage of the Residents' Alternative** is that the IL units are centralized in a single location on the east side of campus, not only preserving the Historic Park from being covered by construction, but also the open space on the west side of the Manor and the beautiful north slope in front of the Manor. The plan saves over 60 magnificent oak, palm and redwood trees, and keeps the imposing views of the iconic white mansion with its sweeping green lawn.

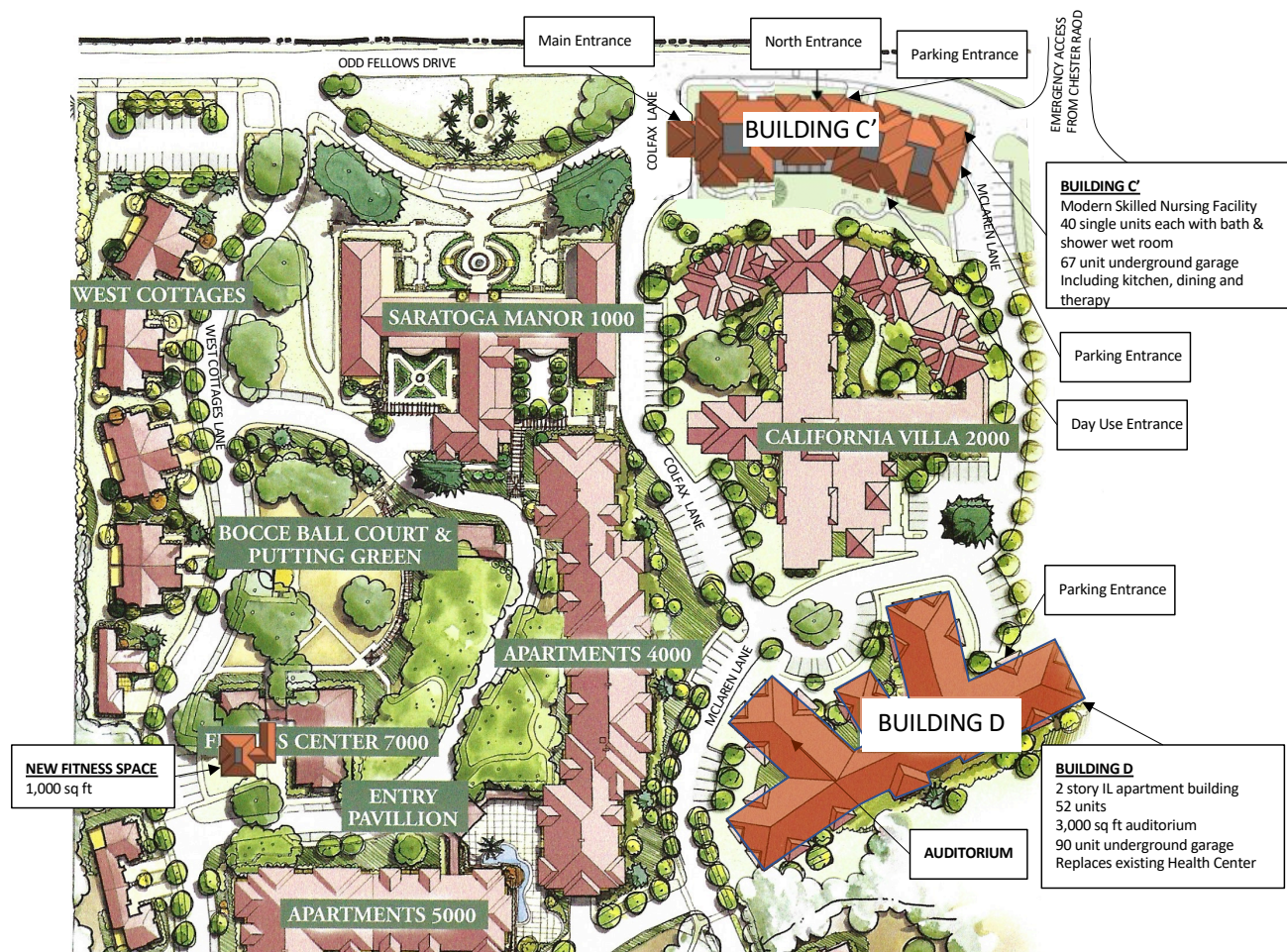
→The PRS assertion that the Residents' Alternative is not financially viable bears close scrutiny. The Odd Fellows borrowed money to build SRC over 20 years ago and they can and will borrow money again to expand our campus the right way, not the wrong way. And please do

not be intimidated by threats that our rental rates are to be increased. Sure, rates go up every year for all Bay Area retirement communities, but they cannot exceed what the market will bear. Even PRS will have to keep pace with what the local market will accept. Otherwise, potential residents will look to other more affordable retirement communities to live.

Quality of life in our retirement years is the reason we all moved to SRC. Let's make sure we preserve what we bought into. And that SRC remains an ongoing institution for retirees in future years.

For further information, see the "Preserve SRC" website:
<https://preservesrccampus.org/index.html>

Preserve SRC Alternative Plan – Project Location and Site Plan



Residents' Survey on SRC Expansion – **Hugh Roberts' Remarks**

IMPROVEMENT/EXPANSION IS NOT “US vs THEM”

by Hugh Roberts, SRC Resident (distributed to SRC Residents July 6, 2021)

As a member of the Residents' Council Ad Hoc Committee on this issue, I proposed this way of thinking. The chairman, Jim Schmidt, asked me to present it to you. You will receive a huge presentation from PRS. You have received a similarly big presentation from a few members of PreserveSRC. But this is not a coin toss where one side wins and one must lose. It seeks to address many problems with a variety of constituencies (Odd Fellows, residents, the city of Saratoga, the surrounding neighbors, and PRS). What should the voice of the Residents be?

There is agreement on much: 1. parking needs are dire; 2. the fitness center must be enlarged; 3. an enlarged community center is crucial; 4. the Health Center needs a major overhaul; 5. from the beginning the proportional numbers of IL, AL, and Health Care have been wrong and must be addressed for long term viability. As a management company, PRS is responsible for addressing all these issues and more with a long-term plan, and is trying to address most of them in their proposal. And PreserveSRC is too, but in ways PRS has rejected.

My proposal is simple:

1. Accept the fact that PRS provides the experts in this field and to the extent that we try to fight on overall planning, specific building sites, financing, long term planning, etc. we are less knowledgeable and less convincing to others.
2. Encourage all residents to oppose the destruction of the Memorial Park. Why has such a level, central building site NOT been built on in the past? It is for SRC the same as Central Park or Golden Gate Park as our green center. And oppose it at the Planning Committee. It is not our responsibility to offer another building. That may limit the possible growth, or PRS may be able to find another building site. That is on their plate.
3. Ask the Residents' Council to present this to the Odd Fellows both through a letter and through our non-voting representative who can make a pitch directly to the Odd Fellows Board.

We came here partly because of the Odd Fellows' reputation for good works and PRS' for management. PRS had saved this place from bankruptcy and has a great reputation as a management firm. They provide us with excellent staff and services. They have a responsibility to maximize the value of this property for the Odd Fellows. Thus they have proposed an improvement/expansion plan. Experts are not always right. And while not owners, we are more invested than renters. As we transients live our “golden years” here, we would like to believe our concerns are considered and there is a continued and positive dialogue with both the Odd Fellows and PRS. We thrive together or we are all negatively impacted.