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Central Complex Committee Fact Finding Report

May 17, 2022

Executive Summary

Oakmont 2030 is a first-of-its-kind initiative launched in 2022 to foster community-wide conversations about Oakmont's future. A major focus is reaching consensus on a common vision about a variety of possible projects and services, chief among them the Central area, where most of Oakmont's facilities are located. Oakmont 2030 is an opportunity for the entire community to engage with one another and define the vectors of an active retirement community – a place where buildings provide a broad and flexible range of rooms and spaces, an environment with walkable open spaces, sidewalks, benches and gathering places, access to businesses and services that allow residents to be confident in the ability to live in their own home and community safely, independently, and comfortably, regardless of age, income or ability level.

Professional facilitators will help shape a series of community conversations, scheduled to begin July 2022, where members can examine data and other information to reach consensus on what Oakmont should and can be in the future. The opinions, ideas, suggestions and comments will be carefully gathered and reported out following the series of town halls and workshops.

All of Oakmont will be encouraged to engage in these important conversations about the Central Complex and its potential for development as a place that is a magnet for socializing, entertaining, learning, playing games or exercising -- while still satisfying the overwhelming desire of residents who want to maintain Oakmont's small town feel.

The emphasis on the Central Complex, and in particular the Berger Center, started over the past decade and was led by directors and standing and ad hoc committees appointed with specific charges. In recent years, leadership has redoubled efforts to understand future needs, in particular space allocation and the growing shortage of areas to meet. A Central Complex Committee (CCC) appointed in May 2020 was charged with gathering data and exploring viable options for future growth. One of the promising results of the CCC's work was to take advantage of a national community building program offered by the American Institute of Architects (AIA). Unfortunately, the collaborative partnerships between AIA and many communities—Oakmont among them-- was thwarted by the pandemic.

The Long Range Planning Committee and the Central Complex Committee (now renamed Oakmont 2030) have been compiling relevant data on Oakmont for more than two years with the goal of informing a community vision. * By employing skilled professionals, the Oakmont 2030 process will engage

stakeholders both within and outside of Oakmont to develop “different but doable” scenarios, assess them, and prepare recommendations for presentation to the entire community. The process does not include creating construction documents or initiating any projects. At the same time, those who engage in meaningful conversations should come away with knowledge of needs and services, barriers to overcoming them and solutions for achieving a clear vision. They will have the tools to bring about an understanding of the issues at hand, the scope of the work needed and the pathways to sound decision making.

* All data was collected pre-COVID

Introduction and Background

Since 2012, OVA’s boards have studied a range of options and proposals for the Central Complex - approximately seven acres that include the Berger Center, the Central Activities Area (CAC), the Central Pool (with cabana), the Maintenance Building, the Village Administrative Center (in leased space), the Lawn Bowling Center, greensward and adjacent parking lots and landscaped area (*Attachment A*). Although studies, surveys and even architectural renderings have been conducted over the past decade, little or no action has been taken for a variety of reasons, including director changeover and a lack of consensus among directors and members.

In 2019, the Long Range Planning Committee began collating existing data, including surveys, and presented significant findings in a Town Hall presentation titled “What We Heard From Oakmont” (*Attachment B*). The report recommended that the Board “hire a community architect to create a vision of our future community that would include a baseline vision to meet essential needs and an enhanced vision of what might reasonably be possible.”

The Central Complex Committee (CCC) was therefore established in May 2020 to:

Explore development concepts by early 2021 for the Oakmont Central Area that will provide active lifestyle opportunities that will benefit current and future Oakmont residents. Overriding priorities will be to maximize the livability, accessibility and safety of the property in ways that are technologically, environmentally and financially sound. This will be a collaborative effort that is assisted by design professionals skilled in community planning, the on-going input from residents of Oakmont, the City of Santa Rosa and other community stakeholders. The purpose of the Committee is to develop “different but doable” scenarios, assess them, and prepare recommendations, not to create construction documents or initiate any work.

In July 2020, the CCC began monthly meetings to collect and review new data, with the goal of submitting a proposal to the Sustainable Design Assessment Team (SDAT) of the American Institute of Architects (AIA) to help develop alternatives for the Central Complex.

The engagement of SDAT would have given Oakmont access to their acclaimed Communities by Design team, a group of architects, community planners and other professional disciplines to work alongside residents and other key stakeholder groups to help Oakmont create a broader vision of what could be possible in Oakmont's future, particularly if the plan included: (1) adjacent commercial and business properties (not owned by OVA - *Attachment C*); and, (2) OVA-owned undeveloped parcels (*Attachment D*).

Beginning in January, 2021, several members of the CCC and Mitch Conner of ArchiLOGIX, Oakmont's community planning consulting company, began meetings with the AIA Communities by Design team. But the pandemic cut short the planned initiative, putting SDAT onsite programs on hold nationwide. Rather than wait several years to formally apply, AIA offered an online process that included virtual meetings, a lifestyle survey of all Oakmont residents, and discussions of the survey results and a review of any plans.

It soon became clear, however, that the virtual approach could not replace a more traditional onsite process that was likely years away. Therefore, the CCC became a subcommittee of the Long Range Planning Committee and continues the scope of work outlined by the Board under the new name **Oakmont 2030**. In July, two community engagement companies were interviewed to take the place of the AIA.

Although the plan below was originally written for the AIA following their SDAT proposal format, it now serves as the Fact Finding Report of the CCC and as a framework for **Oakmont 2030**. It is the belief of the many people who have been a part of this effort that a new process is needed to move Oakmont forward in the discussions about how best to both meet the needs of current members as we age in place and to ensure that our community attracts and welcomes new, younger retirees. It is hoped that the work of **Oakmont 2030** will guide future OVA Boards, members and staff in making forward-thinking decisions for years to come.

Brief Community Description

Oakmont is an active living community for residents aged 55 and older, located on Scenic Highway 12 in the Sonoma Valley and within the city of Santa Rosa. It offers seniors access to over 170 clubs, two golf courses, three swimming pools, pickleball, tennis, bocce, petanque, horseshoes, lawn bowling and shuffleboard courts and numerous organized cultural and lifestyle activities.

History

The property that is now Oakmont is the former site of Annadel Farms where Samuel Hutchinson, and later Joe Coney, raised livestock, built a cheese factory and grew hops. In 1963, the land was annexed by Santa Rosa and purchased by Sacramento Valley developer, H. N. “Nor” Berger who proposed building 600 homes, where he envisioned a new type of community for postwar retirees to get away from congested suburbs and live an active lifestyle in a more rural landscape. The first home sold on July 31, 1964.

Although the project was to be built in stages, Frances and Nor Berger worked with Ted Robinson, a leading golf course designer, and top architectural firms to map out every street, cul de sac, circle and dwelling. By 1980, most of the project was completed and Berger, looking forward to retirement, struck a deal with the Gallaher Group of Santa Rosa to complete Oakmont.

Part of the sales contract gave Gallaher ownership of the golf course if Oakmont residents turned down their right of first refusal to buy it. Although the residents rejected the proposed \$1500 per household assessment in 1989, a long series of lawsuits kept ownership in limbo until 1991 when the title was transferred to Oakmont Golf Courses, an entity partially owned by 863 resident members. In 2019, the course experienced financial hardship, but this time the residents voted overwhelmingly (by the largest margin in Oakmont history) to purchase the land and buildings – with 73% of owners saying yes to the purchase of all golf course assets.

Oakmont Gardens, a senior living facility offering both independent and assisted living, was developed by Dr. Thomas Torgenson of Santa Rosa and Hume Thomason of Newport Beach in 1985, opening its doors in 1987. When the Oakmont Gardens investors approached H. N. Berger to purchase the land, they were turned down because Berger wanted to control the property and instead, a 99-year lease was signed.

Population Figures

Oakmont is an active senior community of approximately 1,500 acres with about 3,200 residences and some 4,720 residents, including those in 163 independent and assisted living rental apartments at Oakmont Gardens.

Demographics

Census data from 2020 is still largely unavailable, so the most current demographic study from 2010 (*Attachment E*) shows Oakmont’s median age is 76. Sixty-one percent of the residents are female and 39% male. About 20% are “Baby Boomers,” while less than 2% of the residents are under 50. Only 2.1% are Hispanic and 2.7% of the residents are non-white.

About 67% of the men are married, but only 43% of the women are married. As Oakmont residents age, a significant difference develops between the men and the women with two-thirds of women in Oakmont over 85 years old being widows.

Single women make up almost 80% of the 55-59 age group and are the largest group of newcomers to the community.

About 77% of the homes in Oakmont are owner-occupied, a number that includes Oakmont Gardens. Most owner-occupied and renter-occupied homes and apartments have single occupants.

Changes in the Oakmont median age of 76 are expected to take place slowly because the housing turnover rates have historically been low. In 2014, the median tenure in a home was 12 years for owner-occupied houses and 8 years for renter-occupied homes.

Economic Information

According to a report prepared for the Long Range Planning Committee using 2010 Census data, "The population of Oakmont is solidly middle class with an estimated median household income of \$56,000 and the average was \$75,000. Married couple households average over twice the income of persons living alone -- \$87,154 compared to \$39,441."

"About 40% of married couple families had a 2010 income over \$100,000, and 10% of them had incomes over \$200,000. On the other hand, it appears that approximately one quarter of the single residents are living on less than \$25,000 per year. Thus, while the average Oakmont household income is \$75,000, we have many who are not." These statistics are available in *Attachment E*.

Historically, the OVA received developer fees for every home built. Today, little land remains available for building. As a result, OVA derives almost all of its operating funds from dues, which are now \$106 per person per month. With few exceptions, OVA Boards have funded most projects with available funds and assets and occasionally through loans and special assessments (CAC). A comparison between 30 northern California retirement communities (*Attachment F*) shows that Oakmont dues are below many other communities by several hundred dollars per month and new resident surveys show that incoming buyers consider dues to be low.

Form of Local Government

The OVA is governed by a seven-member volunteer Board of Directors who are elected to fill two-year staggered terms. The Board's mission is to "provide OVA members with athletic, recreational and club facilities to enhance the quality and enjoyment of their Oakmont residence, and to have Oakmont perceived as a premier active adult retirement community in comparison with other similar retirement locations, thereby

contributing to the well-being of the residents and to the preservation of property values.”

OVA is managed by a General Manager and seven administrative staff members and a two-person Architecture Committee staff. The maintenance team is composed of 8 people. Several positions are open and candidates are being sought. The OVA is a California non-profit 401(c)7 corporation that adheres to the California Davis-Stirling Act.

Sixty percent of homes are owner-maintained, with the remainder in 37 sub-HOAs with Boards of Governors and separate, additional dues structures. Ranging from three to 94 units in size, these sub-HOAs may include landscaping services, varied exterior maintenance, and master insurance for the structures. Like OVA, all must comply with the Davis-Stirling Act and are governed by their own bylaws and Covenants, Conditions & Restrictions (CC&Rs). Sub-HOA dues range from approximately \$75 to close to \$400 monthly.

Important Project or Contextual Information

The CCC was composed of members of the Oakmont Building Construction Committee (BCC), the Long Range Planning Committee, the Oakmont Community Development Committee (OCDC), the Board of Directors (BOD) in addition to OVA’s General Manager and Maintenance Manager. (A list of members follows.) As part of its formation in May 2020, the BOD requested four principal areas of activity.

- Exploration into the possibility of engaging an American Institute of Architects "Design Assistance Team" to contribute to assessing opportunities that could take a broader view, including properties in central Oakmont outside of OVA control
- Following extensive community engagement, bring in ArchiLOGIX to perform preliminary scoping services
- Documentation and descriptions of multiple realistic future configurations of the Oakmont central area
- Development of high-level, credible data, including cost ranges, supporting possible changes in the central Oakmont complex

Regional Setting and Influences

Oakmont is located 70 miles northwest of San Francisco, a one-hour plus drive from airports, museums and culture of a major metropolitan area. Cradled between the Mayacama and Sonoma mountains, Oakmont is located on Highway 12, a scenic roadway in the Sonoma Valley that is home to more than 425 wineries. Oakmont itself is in the Santa Rosa City limits, and as such enjoys city services.

Oakmont is a desirable place to live. Resident surveys show that the three most important reasons for deciding to move to Oakmont were the natural beauty of the location, the wide variety of activities and opportunities to meet socially, and the

proximity to family members. Other factors listed as important were safety, association amenities and weather. New resident surveys continue to echo these themes.

Much of Oakmont is located in the Urban Wilderness Interface (WUI). Trione-Annadel Park borders about two miles of Oakmont south and east sides in two separate areas. While Oakmont's beauty and location in the Valley of the Moon draws residents, the increased threat of wildfire has prompted Public Safety Power Shutdowns (PSPS), and wildfires destroyed two homes in 2017 and six in 2020.

Past and/or Ongoing Planning Efforts

In 2007, the CAC was built at a cost of \$2.5M. Originally meant to be large enough to include space for the OVA office that would also serve as a welcome center for prospective buyers, the building was scaled back considerably and now houses a fitness center, library, game and meeting rooms and a large lobby.

In 2014 - 2015, the Berger Improvement Committee did detailed studies of the building but did not finalize plans. In 2018, the Building Action Committee also turned its sights to the Berger Center, developing three plans that were presented to residents. The 2018 Board selected an option for minimal Berger Center remodeling to start in a couple years. Subsequent boards have taken action on seismic upgrades, new flooring and other cosmetic updates. Attachment G shows the various options for the Central Complex presented in the February 2020 Central Area Project Framing Workshop.

In December, 2020, **Oakmont 2030** held a meeting with representatives from the CAC Building Committee, the Berger Improvement Committee, and the Berger Action Committee to discuss the successes and failures of these three initiatives.

Several important points were made:

1. Board turnover was by far and away, the most important reason given for why Berger projects were derailed. Everyone agreed that going forward a master plan should be developed that will be rolled out in phases and provide community direction to incoming boards.
2. Money. While the CAC building was built, it was considerably scaled back from the original concept designs. As a result, the space for the OVA administrative building was eliminated from the plan. Money is also at the heart of the debate about the Berger. One perspective argued that the Berger has 'good bones' and could be remodeled to meet people's needs for less than a new building. The other perspective argued that the cost of remodeling will be significant and that for just a "few dollars more" a new building could be built.
3. The research done by these committees is a valuable asset that will be used going forward.

4. Contrary to the building of the CAC, most efforts for the Berger have focused more on what the facility should look like rather than on member usage and meeting needs. There was less controversy with the CAC project because almost everything that was being built was associated with meeting the needs of a large constituency - like the gym, library and card rooms. As a result, there was immediate and broad support.
5. The types of rooms that are needed should be defined.
6. The issue of required parking remains a crucial consideration.

Problem Statement and Issues Analysis

To ask what the Central area of Oakmont should look like in the future means creating a common vision of the opportunities and services that it should or could provide for residents. It is the development of a place that is a magnet for socializing, entertaining, learning, playing games or exercising while satisfying the overwhelming desire of residents who want to maintain Oakmont's small-town feel.

What is needed is a roadmap that is informed by key demographic factors and other data, and creates, over time, a plan that offers businesses, gathering places and other amenities that specifically meet the needs of the diverse group of seniors who call Oakmont home. An active retirement community demands buildings that provide a broad and flexible range of rooms and spaces. It demands walkable open spaces, sidewalks, benches and gathering places. Oakmont's growing population of single women means greater attention to safety. The increase in people choosing to age in place means designs to ensure accessibility and access to technology. Given Oakmont's location and stresses of climate change, the plan must also be firewise and energy independent.

Oakmont 2030 seeks to engage professionals to help find a way to balance these needs and engage the broader community in a participatory process that will result in the development of a vision and framework that leads to a fiscally responsible and sustainable future for Oakmont. In addition, **Oakmont 2030** seeks implementation of strategies that will provide steps that can be taken over a period of time allowing continuous community input and systems to monitor progress and costs.

Study Area

The specific focus of this proposal is the Central Area Complex that includes the Berger Center, the Central Activity Center, pool/spa, the Maintenance Shop, the Lawn Bowling Green, the OVA Office, and the surrounding parking lots. Except for the Office, it is property that is owned and controlled by the OVA (*Attachment A*).

A broader view includes the best use of the land bordering the CAC including Holes 3 and 4 of the golf course and the commercial property that straddles Oakmont Drive (See Attachment C). An even broader view includes the parcels of undeveloped land that are owned by the OVA or border Oakmont and could be purchased by OVA, specifically the former water treatment plant (Attachment D).

Barriers to Success

There are six major barriers to success.

1. Parking

Parking is at a premium and any work on the Berger that increases seating capacity will trigger new parking requirements, for which the city of Santa Rosa has already put OVA on notice.

2. Need for Local Participation by Many Stakeholders

Surrounding the Central Complex are approximately 18 acres of privately-held commercial properties (Attachment C). Surveys conducted by LRPC in 2019 included conversations with a few of those businesses. In general, store owners were receptive to working on ideas that would enhance the entrance area to Oakmont.

In addition, cooperation with the City of Santa Rosa on issues such as parking, safety and zoning is needed.

3. Communications to Oakmont Residents Needs Improvement

The Communications Committee of Oakmont has worked hard to develop channels that reach all residents. The *Oakmont News* is published twice a month containing OVA news and club notices. On Tuesdays, the OVA publishes Inside Oakmont containing information on club events, OVA meetings, special notifications and some outside events or opportunities in Santa Rosa. Special notices are emailed as needed to publicize Town Halls or rulings by the Board.

Because some residents are limited in their use of computers and do not own smartphones, other community communication channels would be helpful. While the *Oakmont News* goes to every household, readership is unknown. Inside Oakmont and special notices go to about 2400 Oakmont residents.

4. Finding Consensus

Historically, Oakmont residents have disagreed on several major initiatives. Purchasing the golf course in 1989 caused disagreements among residents. An original proposal to include a larger gym and OVA's administrative offices in the

CAC building met with opposition. The disagreements concerning the building of pickle ball courts made national news in 2016. Conversely, in recent years, the purchase of the golf course drew a 73% positive vote.

5. **Funding**

The cost of any defined project coming out of community discussion and subsequent planning processes will be determined by a combination of architectural proposals, community acceptance and construction costs and will be rolled-out incrementally as milestones are met.

Oakmont 2030 would seek to develop a comprehensive set of finance alternatives that have here-to-fore not been explored and that would limit the need to raise membership dues including:

1. Construction loans from interested lenders
2. OVA capital reserves from existing OVA accounts
3. Private Placement or the issuance of bonds by OVA
4. Construction cost offsets, such as rental of the Berger Center to outside groups
5. Possible sale, rental or development of Oakmont-owned property
6. Formation of a not-for-profit to raise money for future development
7. Outside funding sources, such as community or federal grants
8. Partnerships with organizations like AARP looking to fund pilot projects
9. Sponsorships by outside companies or organizations that are Oakmont stakeholders

6. **Natural Disasters and PSPS**

The natural beauty of Oakmont comes with a very high price. In 2017, the community was threatened on three sides by the Nuns fire to the Southeast and the Tubbs fire to the Northwest, ultimately destroying two homes. In 2020, the Glass Fire crept into Oakmont, burning six homes and several miles of fencing along Route 12 (*Attachment H*).

In 2019, there were three (one lengthy) PPS events in Oakmont. During the outages, the OVA installed generators from PG&E to keep the Berger and CAC open for people to use for cell phones or medical needs. A new generator was permanently installed in 2020.

The Energy Resiliency Committee has recently installed solar parking canopies panels in the CAC, the West Rec and East Rec parking lots to power the OVA facilities and is working with outside companies to develop an Oakmont microgrid which will impact any future proposed plan.

Scope of Issues

There are six major issues driving Oakmont's need to create an effective Central Complex solution.

1. Space - We Are Almost Out of Room

There are now 170 clubs approved by the Board of Directors that are organized and run by volunteers. All seek some space in Oakmont facilities for meetings and activities. A recent Club Survey (*Attachment I*) conducted by the LRPC found that since 2003, the Board has approved an average of 10.5 clubs per year. Although approximately 5.1 clubs go inactive each year, there is still a net gain of 5.4 clubs a year.

With a total of 11 meeting rooms, the competition between clubs for space is becoming intense. Some clubs, with recurring events like Lifelong Learning, book their space years in advance. OVA scheduling staff reports that prior to the COVID shutdown, it was becoming exceedingly difficult to meet the demand and estimates a hard limit of 180 clubs.

The Club Survey showed that 23.4% said that reserving space is a problem and 14.3% say that the size of the space they are currently using is not meeting their needs. Particularly hard hit are the clubs with memberships greater than 20.

Adding pressure to the need for space is the finding that almost 50% of the clubs of all sizes predict that their membership is likely to grow. And, 48% of the clubs say that they would like to advertise outside of Oakmont to attract new members or attendees at events.

Interestingly, there seems to be a very low level of concern about the lack of space with only 16% expressing any concern and 33% expressing no concern at all. This dichotomy between the potential growth of clubs and the looming lack of space is something that Oakmont residents should be aware of in discussions about the future.

Here is a look at each of the buildings in the Central Complex and its specific needs.

The Berger Center

The Berger Center was built in 1964 to serve far fewer homes and residents. Although 337 seats can be put into the space, fire code limits seating capacity to 280, which is far from the industry standard of 10% of the population or almost 500 residents. Although the Berger is 3,449 square feet, about half of the space is not usable for seating. Storage for clubs is limited, and maintenance equipment is housed in a different building. Twice in early 2020 (before the shutdown in March), there were

overflow seating at events in the Berger with attendance exceeding fire code regulations.

The limitations and deficiencies of the Berger have been thoroughly examined and documented by construction, space planning, and musical and acoustical specialists. OVA clubs, staff, and members have provided critical, thoughtful input through surveys and reports about what works/doesn't work about the Berger's layout, access, and utilization. In the end, three needs compete for this Berger space – first, clubs that require flat flooring for dancing and social events, second, clubs that require auditorium seating and a stage and third, meeting rooms. (See *Attachment G.*)

The CAC

As reported earlier, the CAC was rebuilt in 2007 after being downsized due to pressure from residents. The project cost was \$3.3M of which \$2.5M was borrowed and paid off in seven years.

The most used room in the CAC is the Fitness Center. It is often overcrowded, and because expansion is not easily achieved, the amount of equipment is restricted and often, pre-COVID, had people waiting in line.

The library is out of room for books and has no space for displays or meetings, like book clubs. The arts and crafts room has little storage for regular participants so they are required to carry their supplies in and out with them each visit. There is no room dedicated to Oakmont artists that also has storage for art supplies. The Oakmont Technology Center is small, resulting in capping class sizes. The Central Pool area has numerous issues including being ADA non-compliant. The pool cabana is unpermitted and a fire hazard.

OVA Administrative Offices

The OVA administrative offices are located in rented space. Consideration should be given to what makes the most sense economically over the long-term.

OVA Maintenance Building

Since this building is located in the middle of the Central Complex, a better use of this space should be found. In addition, many of the things in the building are housed there because of insufficient storage space in the Berger.

2. **Optimized Land Use**

Rather than being a cohesive “downtown” like those that exist in some other planned senior communities, Oakmont’s commercial district is a patchwork of buildings and owners. The surrounding land consists of 18.42 acres of 48 different land parcels with more than 10 different owners.

Optimizing the use of land will involve the involvement and engagement of a variety of stakeholders, including the land owners, businesses, Oakmont Gardens, Annadel-Trione State Park and the City of Santa Rosa.

3. **Livability**

Although the Central Complex is a hub of activity, most residents go there for a specific purpose like a class, workout session or game of cards and then leave. Past development efforts did little to conceptualize Oakmont as a village with a central magnet that includes green space, walking trails, benches and places for people to meet and socialize.

A major focus for Oakmont 2030 is to create a common vision among residents about what the Central area could provide and what opportunities could be created that would make Oakmont an even more livable and sustainable community. Of particular concern is the need to understand what space needs future generations will need and want so that Oakmont will continue to attract new homebuyers through the coming decades.

4. **Community Endorsement**

The presentation *What We Heard From Oakmont* (Attachment B) is a compilation of Voices of Oakmont (a survey conducted in 2014-15) and other studies that shows the wide range of opinions on the Central Complex and surrounding issues like funding. While there is an overriding sentiment to keep Oakmont’s small-town feel, from there the opinions were divided.

“Don’t Change Oakmont,” conflicted with those who said “Our Facilities are Outdated” and “We Don’t Have Enough Space for Our Clubs.”

“We Need to Update/Replace the Berger” conflicted with “I’m Afraid I Won’t be Able to Afford to Live Here” and “We Are Spending Money We Don’t Have.”

Oakmont looks to outside professionals to develop ways to foster a greater sense of community engagement that will bring focus and agreement on a vision and a framework for a detailed roadmap of the future.

5. **Elnoka**

Although outside of the scope of this project, the proposed 69-acre development of Elnoka, senior living community adjacent to Oakmont on the northwest, has undisputed impact on Oakmont's quality of life. (*Attachment J*).

Many years in the planning process, Elnoka's recent environmental impact report raised many questions and concerns that Oakmont leadership addressed in a letter to the City of Santa Rosa June 2021. The impact on Oakmont includes the potential for increased usage of the Oakmont golf courses, increased stress on roads during evacuations and the potential for real estate competition against Oakmont.

6. **Current Trends**

The LRPC and **Oakmont 2030** have looked into several trends that have relevance for this proposal - Aging in Place and the incoming Gen X residents.

Aging in Place

We are becoming an older society with the number of Americans over 65 expected to more than double by 2060 to nearly 25% of the U.S. population. According to the AARP, 80% of seniors want to remain in their homes and communities for as long as possible. That groundswell creates different demands on cities and communities like Oakmont. New community models often provide a wide range of services and resources that give seniors the ability to live in their own home and community safely, independently, and comfortably, regardless of age, income, or ability level.

While some of these are outside the scope of this proposal, Oakmont has an important opportunity to create a community that better supports aging in place. Studies have shown that neighborhoods with more resources - parks, recreation centers, community centers, libraries - buffer cognitive decline and that environments that promote walkability and sociability are positively linked to better physical health. A redesign of the expanded Central Complex could consider and accommodate these findings.

Other trends include the increasing number of women who are growing old alone. Age-friendly communities are introducing co-housing options, missing middle housing developments and pocket neighborhoods to meet this need. For Oakmont, this trend may become increasingly important as the number of single women who own property here increases.

Gen X

Gen X refers to the group of Americans born between 1965 and 1980 who are just beginning to reach the age when they can move into Oakmont. They are often characterized as educated, technologically savvy, working to achieve a life balance. This is the generation that will have parents in Oakmont or who will retire here themselves. Accommodation to the needs of Gen X needs to be a big part of the **Oakmont 2030** plan.

Objectives of the Oakmont 2030 Committee

1. Drive the conversation with the community about what Oakmont wants to become.
2. Promote active lifestyle opportunities for current and future Oakmont residents.
3. Further livability, accessibility, and safety of the property.
4. Foster financially viable initiatives.
5. Enhance the value of Oakmont.
6. Implement sustainability practices for water, energy, land and wildlife urban interface.
7. Partner with city, business, and other stakeholders.
8. Align with the City of Santa Rosa's General Plan Update.
9. Include flexibility for future leaders and residents to refine plans as needs change.

Steering Committee Information

Marlena Cannon Tremont, Co-Chair is a consultant with 20 years of experience as the president of Cannon Communications, an award-winning integrated marketing communications company representing a broad spectrum of corporate and not-for-profit clients. Specializing in start-ups and turnarounds, her clients included a water-saving plumbing products company, ITW, the YMCA of Lake County, IL and several corporations specializing in products for the golf industry.

Prior to starting her own company, Ms. Cannon was the director of communications for Outboard Marine Corp. during the sale, hostile takeover and subsequent management turnaround of this Fortune 500 company. Earlier in her career, Ms. Cannon served as a Congressional and state lobbyist for AT&T during divestiture, working to legislatively reposition it from a regulated monopoly to a competitive information movement and management company.

Tom Kendrick, Co-Chair is a consultant, educator, and author. He spent 20 years with Hewlett Packard in its Project Management Initiative (PMI) and has over 40 years of worldwide project management experience, including work for Visa Inc, DuPont, General Electric, and as an independent consultant.

Tom retired in 2017 as Program Director for the UC Berkeley Extension Project Management Curriculum. He is the author of *How to Manage Complex Programs* (AMACOM, 2016), *Identifying and Managing Project Risk*, Third Edition (AMACOM, 2015), and three other popular books on project management. Tom regularly conducts classes and presentations on program, project, and risk management.

Tom completed his BSEE at Princeton University, and has his MBA from the Wharton School and an MSEE from the University of Pennsylvania. He is a certified Project Management Professional (PMP) with the Project Management Institute. Tom is a past president of the Silicon Valley PMI Chapter and a frequent volunteer for many local and global PMI activities. Tom is the President of the OVA Board of Directors.

Katy Carrel is a champion in her community. She is an OEPC (Oakmont Emergency Preparedness Committee) Board member, BCC (Building Construction Committee) member, Central Complex Committee member, Firewise Safety Committee member; and the Oakmont Map Your Neighborhood (MYN) Coordinator.

Katy spent 20 years at Apple Computer as a department and project manager managing multi-million annual budgets accurately and within spending guidelines.

In 2017 the North Bay Business Journal recognized Katy as the Nonprofit Leadership Volunteer of the Year for her work at the Sonoma County YWCA Safe House. She received this award for providing her designing expertise and project management skills to renovate a 7-bedroom confidential safe house for victims of domestic abuse.

Katy also served as a Research Associate writing grants & contracts for NIH (National Institutes of Health) and NIMH (National Institutes for Mental Health) and conducting research on various behavioral science projects.

David Dearden has a professional background in construction management, grant writing, and services for homeless individuals and families.

Beginning as a laborer in the construction industry, he became a carpenter and then advanced to positions as foreman, superintendent, project manager, and owner's representative. His extensive experience includes both residential and commercial projects.

David also did grant writing for California cities, counties, and non-profit organizations, mostly focused on employment development and environmental remediation projects funded by state and federal programs.

He also managed programs that provide services for homeless individuals and families emphasizing training in employment skills development for programs funded by private foundations, and state and federal governments.

Iris F. Harrell is a retired design/build general contractor from Silicon Valley. Her remodeling company specialized in green design/build practices and ADA Aging in Place design, features coining the phrase the “Forever Home.” In 2015, she sold Harrell Remodeling, a residential remodeling company to her 40 employees as a 100% employee owned ESOP.

Prior to that, Iris was a high school teacher in Richmond, Virginia and Rough Rock, Arizona on the Navajo Reservation. She also served as a regional director for Women in Community Service in Dallas, Texas.

A resident of Oakmont since January, 2016, Iris is the chair of the Firewise Committee and the chair of the Building Construction Committee, which manages improvements of the commonly-shared facilities in Oakmont. She has a BA degree from the University of Mary Washington and a Masters in Education from Virginia Commonwealth University.

Elizabeth Lefson worked for the City of South Gate, California for 20 years. Elizabeth held increasingly responsible positions ending as Senior Planner responsible for the reports to the Planning Commission and City Council. She is a graduate of the University of California, Berkeley, College of Environmental Design with a degree in Landscape Architecture. She also holds a Master in Public Administration and a graduate level Certificate in Public Sector Financial Management. She has been an Oakmont resident since 2011.

Jess Marzak was a venture capitalist for 38 years, working for Citicorp Venture Capital, Ltd., Paragon Partners I and II, and BankAmerica Ventures until 2001. He has been an angel/individual investor until 2017. Jess has participated in the creation of new businesses at the seed capital stage, as well as participating in financing of more mature, early stage companies.

He invested primarily in the telecommunications, software and software services industries and has traditionally joined the board of directors of companies he invested in.

He grew up on the east coast, received his BA in Political Science from Occidental College, and an MBA from Wharton School at University of Pennsylvania. He has lived in Oakmont for 5 years and currently serves on the Board of Directors.

Marilyn Pahr holds a MLIS degree from Northern Illinois University and spent the last twenty years of her library career as a Business Research Librarian and Manager of Faculty Services at the Goizueta Business School of Emory University in Atlanta. She served as liaison to the Executive MBA Program with a research emphasis on Competitive Intelligence.

An Oakmont resident since 2014, she serves on the boards of the Hiking Club, Oakmont Sunday Symposium and as chair of the Oakmont Library Steering Committee. Involvement in Oakmont Lifelong Learning, Genealogy Club, Futures Club

and teaching classes at the OTLC are other areas of interest. Outside of Oakmont, as an avid WWII buff, she served as Deputy Commander of the Atlanta WWII Roundtable and continued her interest in California by conducting veteran interviews on behalf of the Pacific Coast Air Museum as part of the Library of Congress's Veteran's History Project. Her most fun volunteer position is as "ice cream girl" at the popular Hot Dog Thursday Open Cockpit Event at PCAM. She also enjoys being a cottage docent at Jack London State Park and a Transcendence Theater volunteer.

Attachments

Attachment A - Central Complex Map

Attachment B - What We Heard From Oakmont

Attachment C - Larger Oakmont Study Area

Attachment D - OVA Owned Property

Attachment E - 2010 Demographics Study

Attachment F - Dues Research

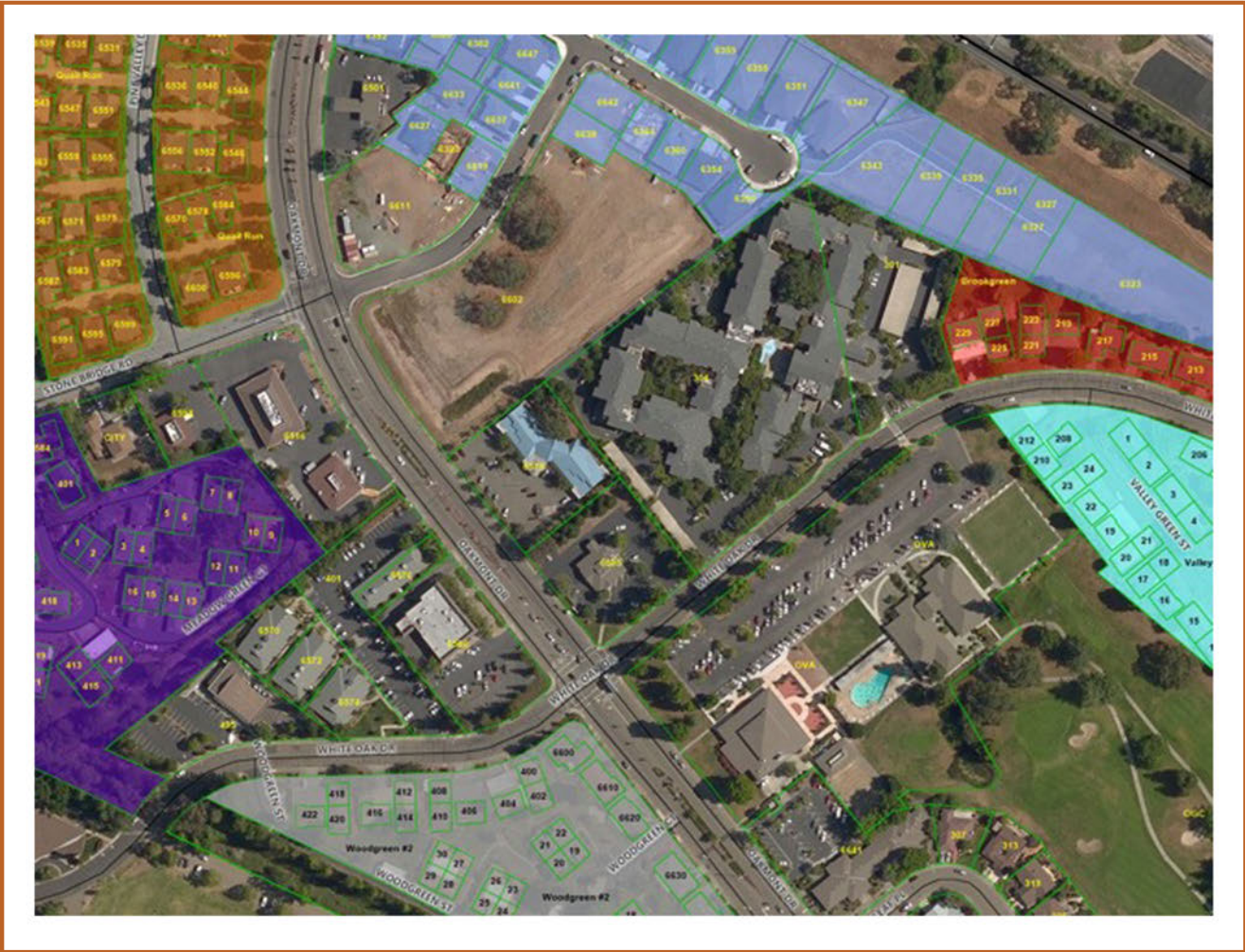
Attachment G – February 2020 Central Area Project Framing Workshop

Attachment H - Oakmont Fire Maps

Attachment I – Club Survey Results

Attachment J - Elnoka Map

Attachment A Central Complex Map



Attachment B

What We Heard From Oakmont



What We Heard from Oakmont

Our Data: Where Did It Come From?

- *Voices of Oakmont Survey – 2015*
 - *Listening Sessions and Focus Groups*
 - *Resident Surveys – Both on-line and paper*
 - *1,250 online surveys and 389 paper surveys received*
 - *Used only open ended comments received using the respondent's own words*
- *The Future of Oakmont Workshop – Nov. 2018*
 - *Recorded what everyone said.*
- *Stakeholder Interviews*
 - *Conducted by the Long-Term Planning Committee over several months*
 - *Clubs, Service Organizations, Realtors, HOAs, Realtors, New Resident Surveys, Competitive Interviews, and Demographic Statistics*



Our Data: What is it?

- *Quotes from residents and stakeholders*
 - *Over 400 quotes collected and processed*
 - *Grouped into Themes where several people had a similar point*
- *A Theme Label at the Top*
 - *The theme is a summary of what several people were saying something similar*
 - *My words*
- *Quotes*
 - *The top 3-5 quotes that belong to the theme*
 - *Some themes had many more quotes*
 - *As close to being the exact words of the person interviewed as possible*
- *Arranged into a Story*



The Story

- *I will show each theme and collection of quotes*
 - *I will show and read each slide*
 - *Helps groups to both see and hear the story*
 - *Achieves a deeper understanding of the story*
- *Presenting the story will take 20-25 minutes*
 - *Please be quiet during the entire reading of the story*
 - *Please hold your questions or comments until after the story is complete*
- *Discussion period to follow*
 - *The main purpose of this workshop is to discuss these finding with each other*
 - *Co-facilitators will help record what you say and pass microphones around so each person who wants to speak can be heard.*
 - *The Board and the Long-Range Planning Committee are present.*



Ready to Begin?

Why do people choose to buy homes in Oakmont?

From Realtors

- *"They want to give up the 'trophy house' and downsize."*
- *"They want to move out of neighborhoods that are primarily families (especially with teenagers!)."*
- *"The beauty of the surrounding area."*
- *"They love the Valley of the Moon, the weather, and the many activities available in Oakmont."*
- *"Desire to be in a retirement community with lots of amenities (a variety of clubs, social activities, and fitness opportunities)."*
- *"The golf course is very important to new buyers. It provides open space and beautiful views."*



What We Heard From Oakmont

Who Lives in Oakmont?

Demographic Data from 2010 Census

- *The average age for Oakmonters is probably still close to 76.*
- *Most of us are women, 61% overall and 35% of new purchases are by single women.*
- *Oakmont is solidly middle class and married couples are more secure financially.*
- *Most Oakmont households receive both Social Security and a pension or retirement savings.*
- *88% of new Oakmont residents come from California, 66% come from Northern California.*



Keep Oakmont a Small Town

Residents

- *"Oakmont has a small town feel to it that we like very much."*
- *"Keep it quaint and like a small town."*
- *"The "quaintness" should be maintained. I do not want Oakmont to become like all the other cookie cutter retirement communities."*
- *"I am concerned we will lose our small-town feel. We need to keep our plans in scale."*



I Want to Keep Oakmont the Way it Currently Is

Residents

- *"I hope that the current Board can keep things mostly as they are."*
- *"Focus resources on maintaining the EXISTING facilities at a high level of quality."*
- *"Oakmont is a pretty nice place as it is. We are not a Del Webb community, thank God."*
- *"It is an excellent senior community. Keep it attractive but don't worry about keeping up with the high-end Jones."*



However, Our Facilities Are Outdated

Residents

- *"Nothing turns away prospective Oakmont residents faster than tired facilities, outdated decorating, and "business as usual" attitudes."*
- *"The Berger Center looks very tired on the exterior and needs a facelift."*
- *"I feel since so many clubs use the Berger Center for Socials it needs a total remodel. Everything in there is so outdated."*
- *"Our AV systems are outdated and are too complicated."*
- *"The lighting, sound system, air conditioning, flooring, and kitchen need to be redone."*



We Don't Have Enough Space

Residents

- *"We don't have enough storage space."*
- *"We don't have enough auditorium space."*
- *"I am concerned that we will lose the space that we have."*
- *"Expand the space so more people and events can be accommodated."*
- *"The Berger Center really needs to be expanded so the special events aren't so terribly crowded."*



Our Clubs Don't Have Enough Space

From Our Clubs

- *"We need more meeting spaces for all clubs."*
- *"Our space is really too small to accommodate everyone."*
- *"We would be able to offer more classes and performances if we had more space."*
- *"We're fighting other clubs and activities to keep our current space."*
- *"The fitness center is a joke, needs a serious upgrade, it is the worst fitness center in any senior community."*



What We Heard From Oakmont

And Participation in Clubs is Growing

From Our Clubs

- "Our membership has quadrupled over the last few years."
- "Our membership tripled in last three years, from 25 to 75 people."
- "The facility problem gets worse every year because we keep adding new clubs."
- "I'm not sure how many more activities I can add because of competition for space."
- "The Fitness Club needs to double in size to support the community correctly."



We Need to Upgrade the Berger Center

Residents

- "The Berger Center needs to be enlarged and upgraded."
- "Improve the Berger Center; take into consideration future growth and needs."
- "Modernize the Berger Center's interior and expand its capacity for events."
- "An enlarged and integrated central facility that encompasses the present CAC and Berger into a comprehensive center worthy of Oakmont."
- "Berger Center renovations and expansions should be more Del Webb like to address the future and loss to other 55 + communities."
- "Berger center complete redo!!"



Replace the Berger with Something Bigger and Better

Residents

- "Connect the Berger Center to the CAC and expand the fitness center and library."
- "Tear down the Berger Center and build a new facility with a theater, more meeting rooms, a ballroom, a great kitchen so we can have better caterers."
- "Berger torn down and rebuilt to 21st century standards."



We Want Additional Facilities

Residents

- "We need a comprehensive plan for the whole Berger, CAC complex and make it a gathering place for our residents."
- "We need a performance venue. This could act as an additional source of revenue."
- "We need a true theater with comfortable seats that were staggered and ramped so sight lines could be used."
- "The idea of building a performing arts center as a separate building was very popular with many of the clubs we interviewed."



We Need to Support Informal Community Gatherings

Residents

- "Enhanced community spaces where residents could congregate."
- "A total remodel of Berger that includes having connection between CAC."
- "Incorporate a coffee bar/cyber cafe/wine bar into the Berger Center with room for people to socialize."
- "Shade area for outdoor sitting in the Berger center area."



I am Concerned I Won't Be Able to Afford to Live Here

Residents

- "I am concerned I won't be able to afford to live here."
- "The cost of living in Sonoma County is increasing rapidly."
- "There are many people here that live on a single income and are stretching their budgets to be able to be in this wonderful place."
- "There are many who cannot afford a raise in our HOA dues."
- "It would be sad to see older residents have to leave Oakmont because they can no longer afford to live here."



What We Heard From Oakmont

I am Concerned We are Spending Money We Don't Have

Residents

- "I am concerned that we are spending money we don't have."
- "Don't spend money that we don't already have or will be recaptured through current dues."
- "I would hope the Board would be less "free-wheeling" with our money."
- "Let's not take on too much debt."



I am Concerned We Are Creating Grandiose Plans We Can't Afford

Residents

- "The cost of many of the projects seems excessive to me."
- "I believe Oakmont has to renovate buildings to attract new people. But, please be conservative and find ways to do the job without overspending."
- "We hope that our Board is fiscally responsible and does not spend our money on embellishments over critical infrastructure."
- "We have a wealth of amenities right now. I am concerned about raising dues or adding assessments to build new amenities that we don't really need."



So, Please Plan Carefully

Residents

- "The Berger center likely should have something done following careful study to determine the most reasonable course for budget and future viability of the project."
- "I would like to see improvements, but I want them to be well thought out."
- "Prioritize expenditures, create a long-range plan, and research needs."
- "Are 'needs' being addressed before 'wants'?"
- "I'd like the Board to lead the community to develop a vision for Oakmont in 2025 or 2035 and then the steps to realize the vision."



Keep the Dues Increases to a Minimum

Residents

- "We are blessed to be living in this beautiful valley. Try to keep the monthly dues increase to a minimum."
- "Work on ways to keep HOA fees as low as possible without having the property appearance decline over time."
- "Keep us fiscally solvent. We should appear as contemporary as other similar retirement facilities, but, offer better value."
- "DO NOT overspend on costly new facilities that result in increases in fees/assessments."



However, Oakmont Needs to Be More Competitive

Residents

- "Get more competitive."
- "We need improvements that will keep Oakmont competitive with the top retirement communities so that property values are maintained."
- "The community needs some upgrades to stay competitive with other senior housing developments."
- "Keep up with trends in other retirement communities to assure home values."



We Need to Invest in Facilities Improvements

Residents

- "I think it is important to be willing to invest in facilities improvements, both for the benefit of residents and enhancement of property values."
- "Invest now to keep the facilities in top-notch shape."
- "Raise the dues, initiate special assessments and find other ways to raise money for the needed and desired changes to Oakmont."



What We Heard From Oakmont

Most New Residents are Younger and More Affluent

From Realtors

- "New residents are younger ... in mid-to-late 60s and 70s, from Sonoma County, Marin County, or the Bay Area, because they're downsizing."
- "We are seeing younger buyers the last few years, and they are interested in safe communities with good amenities."
- "Buyers are younger now, more affluent, and mostly come from the Bay area; cost is not as much of an issue."
- "Most new buyers can afford to pay for their home in cash, but some choose a small mortgage due to low interest rates now."
- "Very few have big mortgages. Most purchases are in cash."



New Buyers See OVA Dues as Low

From Realtors

- "Dues (currently at \$75/person/month) are not a deterrent to new purchasers."
- "OVA dues and club membership fees are dirt cheap and not a concern for new buyers. Even those with fixed incomes are not concerned about this."
- "95-99% of new buyers think our dues are ridiculously low."
- "Buyers say that OVA dues are a bargain."



Recreational Facilities are Important to New Buyers

From Realtors

- "Be sure to keep the recreational facilities updated so we can compete with other retirement communities."
- "Home buyers love our gym and say that the more facilities we have the better."
- "The biggest fear of buyers is the future of the OGC."
- "Potential buyers need to be assured that the golf courses will stay, and their property values won't decline."
- "The majority of possible purchasers don't play golf but like the open spaces."



Our Leaders Need to Think Beyond Their Personal Interests

Residents

- "Drop your personal agendas and listen to the residents."
- "We don't want decisions being made based on personal biases and values."
- "Recognize that Board members have a fiduciary responsibility whose basic job is to represent their constituents and not simply to propose and advocate those projects and policies which they personally consider important."
- "Use our dues for real needs rather than the personal interests of members of the Board."



Listen to the Whole Community, Not Just the Louder Voices

Residents

- "I am tired of the few angry complainers getting their way."
- "Listen to ALL the residents, not just the noisy few."
- "Pay attention to the results of this survey, instead of approving personal agendas by a small vocal group of residents."
- "The Board should represent all of the residents, not only those with the loudest voice."
- "Stop fighting among yourselves and truly listen to all of the residents."



What Our Competitors Have

From our Survey of Competitors

- "All of the communities we interviewed had an activities director to coordinate all community activities."
- "Three of four communities had a new large fitness center which was a central activity for the residents of the community."
- "Every community had a central 'social' area centered around a small coffee and snack bar, or restaurant, that people regularly used for informal social interaction."
- "Fees were charged in three of the four communities for room rentals and other activities that are free at Oakmont."



What We Heard From Oakmont

What Our Competitors are Doing Financially

From a Survey of Competitors

- "Dues are \$147/month/home for enforcement of CCR, front landscaping and major buildings." (Springfield)
- "Additional fees of \$56/month/home for gates, streets and street lights (infrastructure)." (Springfield)
- "HOA dues are \$127/month/home, going up to \$133 next year." (Sun City)
- "Currently fee of \$1,500 (going up to \$2,500) for each home sold which raised \$538,000 last year for a Community Enhancement Fund, which pays for new construction and remodels (keeps dues low)" (Sun City)
- "Music venues include an outdoor 2,500 seat amphitheater and the public is invited to all performances. This is a revenue generator for Sun City."

End



LRPC Conclusions

Through interviews, the LRPC identified the following needs:

- There is a critical need for more space to properly support our activities, clubs, and fitness center.
- We need to keep Oakmont competitive and attractive so we can continue to attract new home buyers.
- A performance venue would be very useful to our residents and clubs and could be a source of revenue.
- A community gathering center would enhance our sense of community and improve social interactions essential for this time of life.

Conclusion:

Meeting these needs is essential to keep Oakmont competitive over the next 20 years and would be seen as affordable to new buyers and most existing residents.



Recommended Next Step

- Hire a community architect to create a vision of our future community we can all see.
 - A baseline vision to meet our essential needs. MINIMUM NEEDS
 - An enhanced vision of what might be reasonably possible. ENHANCED



What is Our Vision?

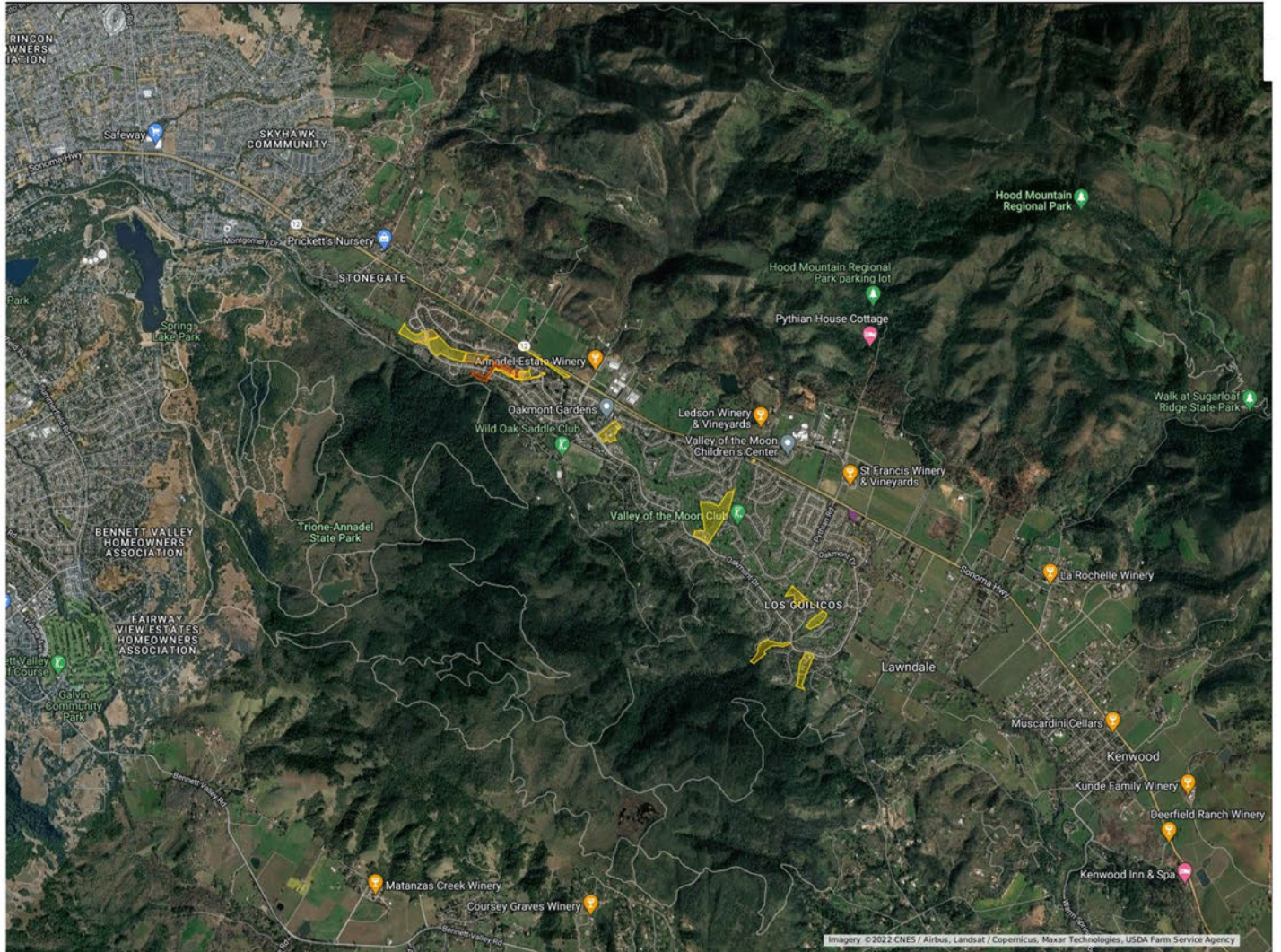
- What can you tell us about the vision you would like to see for Oakmont?
 - How should we go about meeting these needs?
 - What does it look like?

End



Attachment D

Oakmont Owned Property



Attachment E

Oakmont: Who are we?

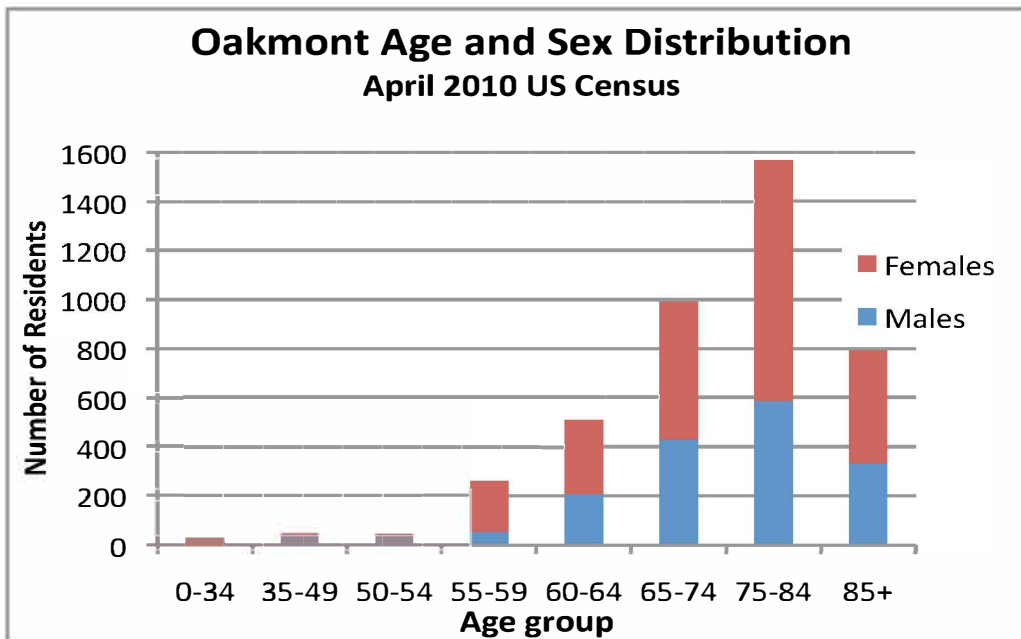
A Snapshot of our community from the April 2010 US Census
Report To LRPC on 2010 Oakmont Demographics

Contents

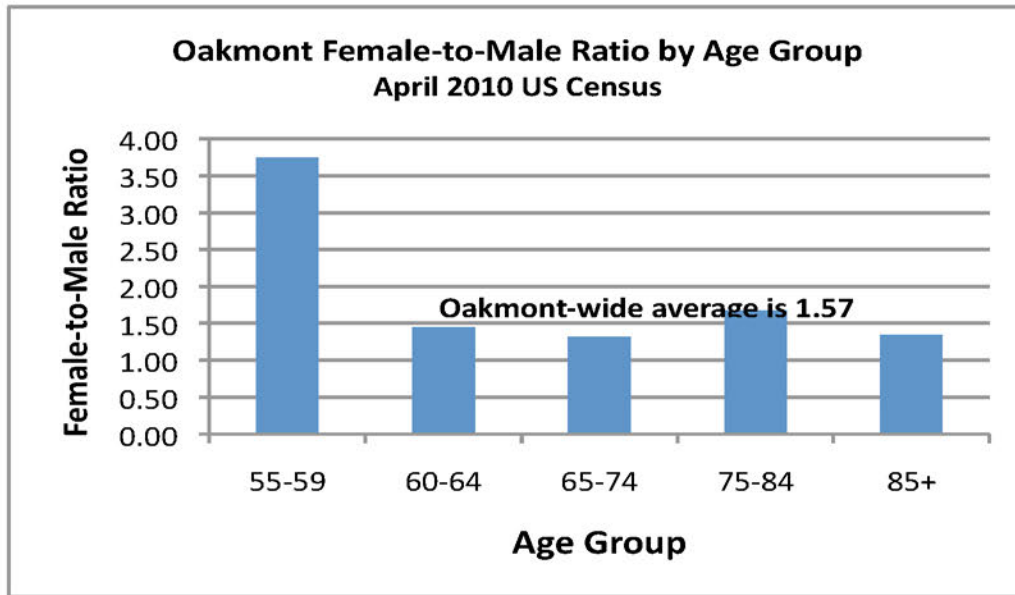
Age and Gender.....	1
Marital Status	2
Home Ownership and Tenure	3
Past Demographic Characteristics.....	5
Income and Employment	5-7
Where do Oakmont’s Residents Come From?	8

Age and Gender

We are a 55+ community of 4465 residents, with a median age of 76. 1758 of us are male and 2707 are female. About 20% of us are “Baby Boomers”, while less than 2% of our residents are under 50. Only 2.1% of our residents were Hispanic, and 2.7% of the residents were non-white.

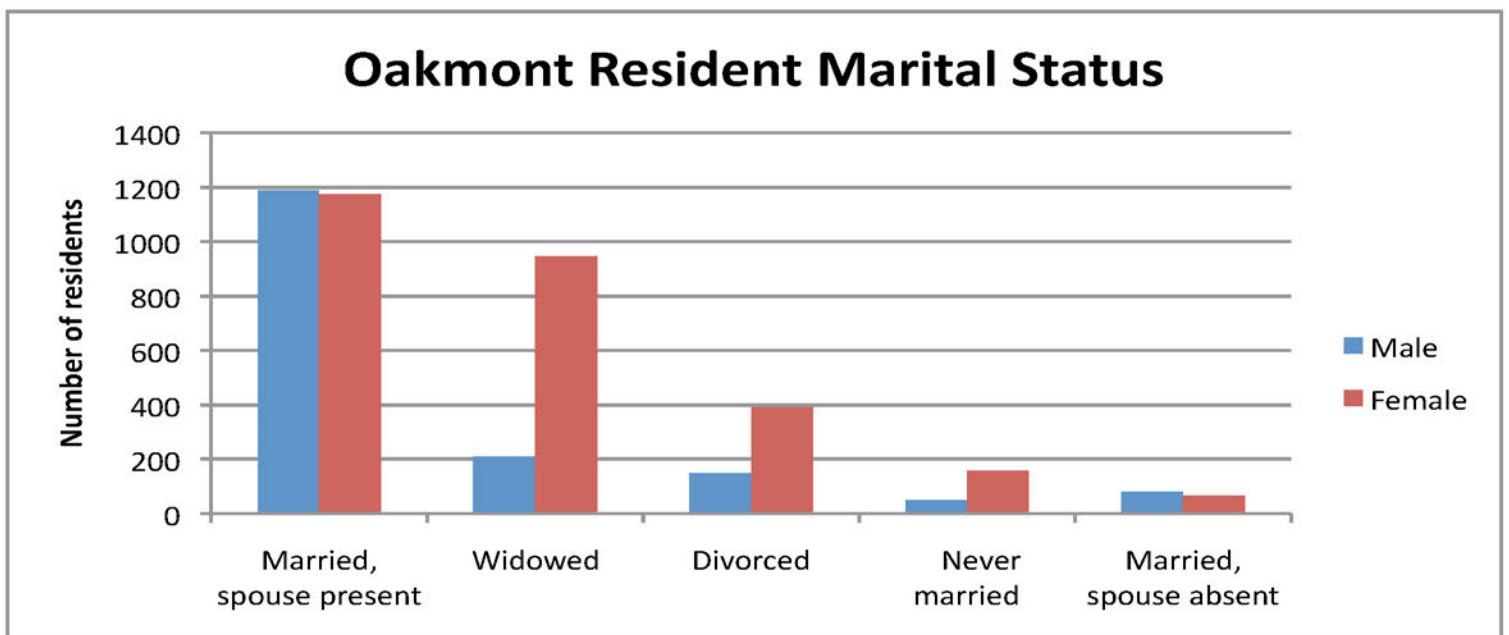


2. **Most of us are women, particularly the newcomers.** Overall, women make up 61% of Oakmont’s population, giving an average female-to-male ratio of 1.57. Women make up almost 80% of the 55-59 age group. Approximately half of these women are married, many to older Oakmont men. Somewhat surprisingly, although women outnumber men in the 85+ age group, their ratio is actually a bit lower than the Oakmont average.

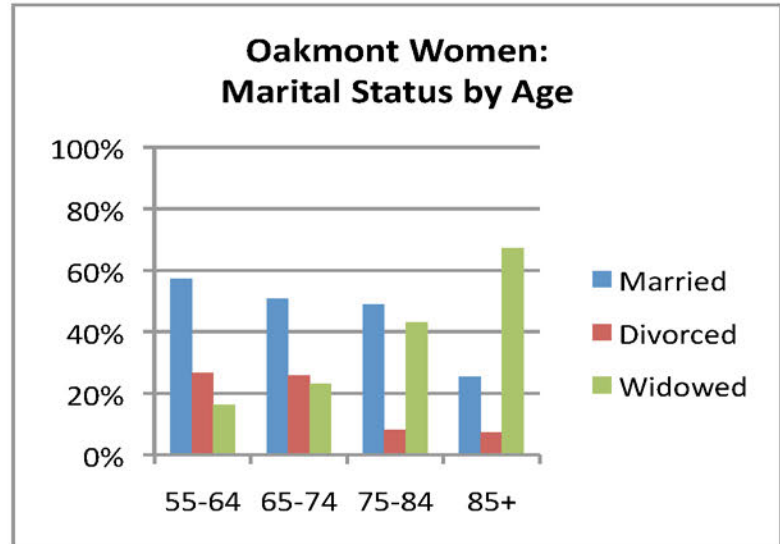
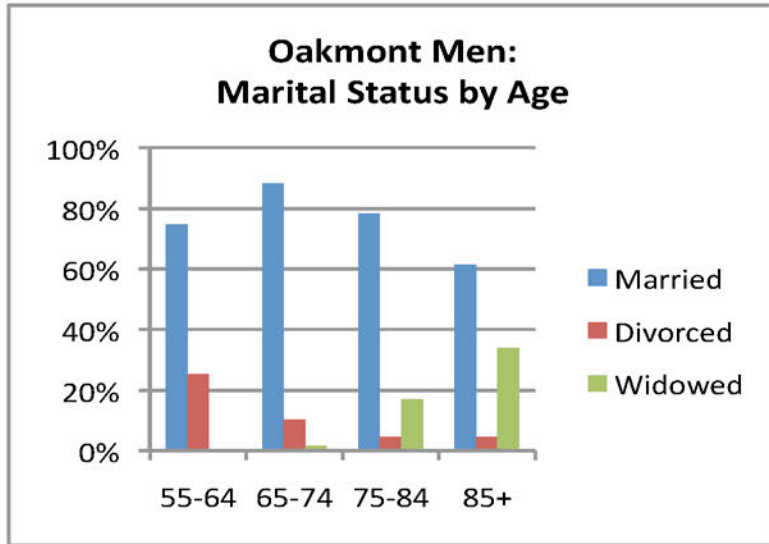


Marital Status

3. **Most men are married, and most women are not.** About 67% of the men are married, but only 43% of the women are married. Most of our women are widowed or divorced.

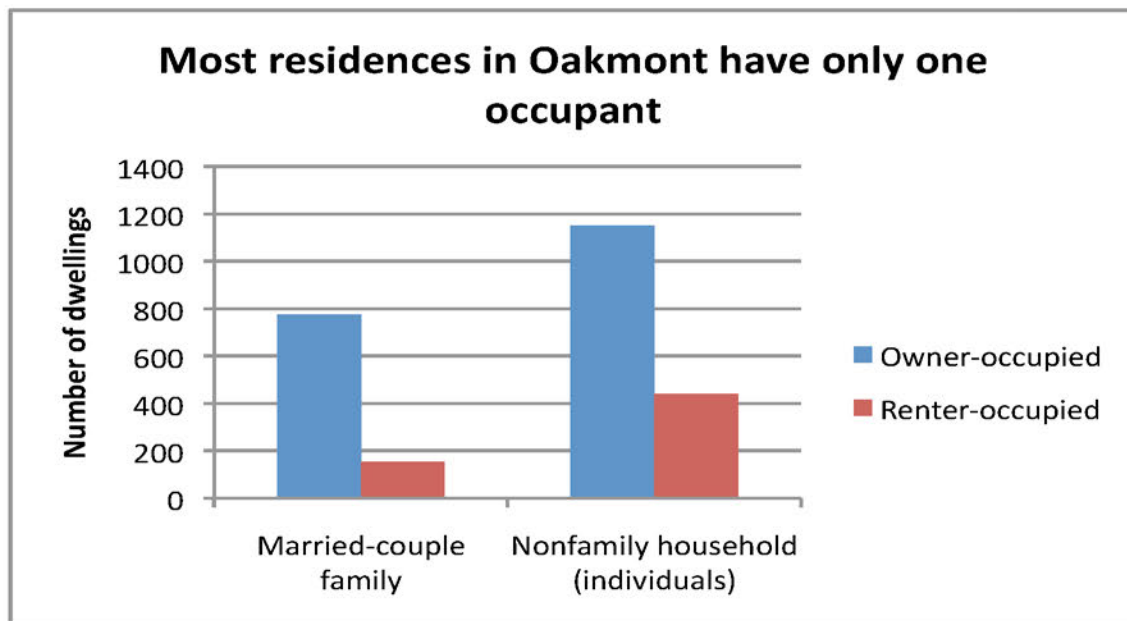


4. As Oakmont residents age, a significant difference develops between the men and the women. This is seen in the two graphs below. In the Oakmont Baby Boomer age group of 55-64 there are only slight differences in marriage status between men and women, with most of each sex being married, and about 25% divorced. But it changes substantially for the 65-74 group. The divorced men tend to remarry more, boosting their marriage rate to 88%. A large majority of men in every age group are married. This is not the case for the women. The 75-84 age group has almost as many widows as married. Two-thirds of women in Oakmont over 85 years old are widows.



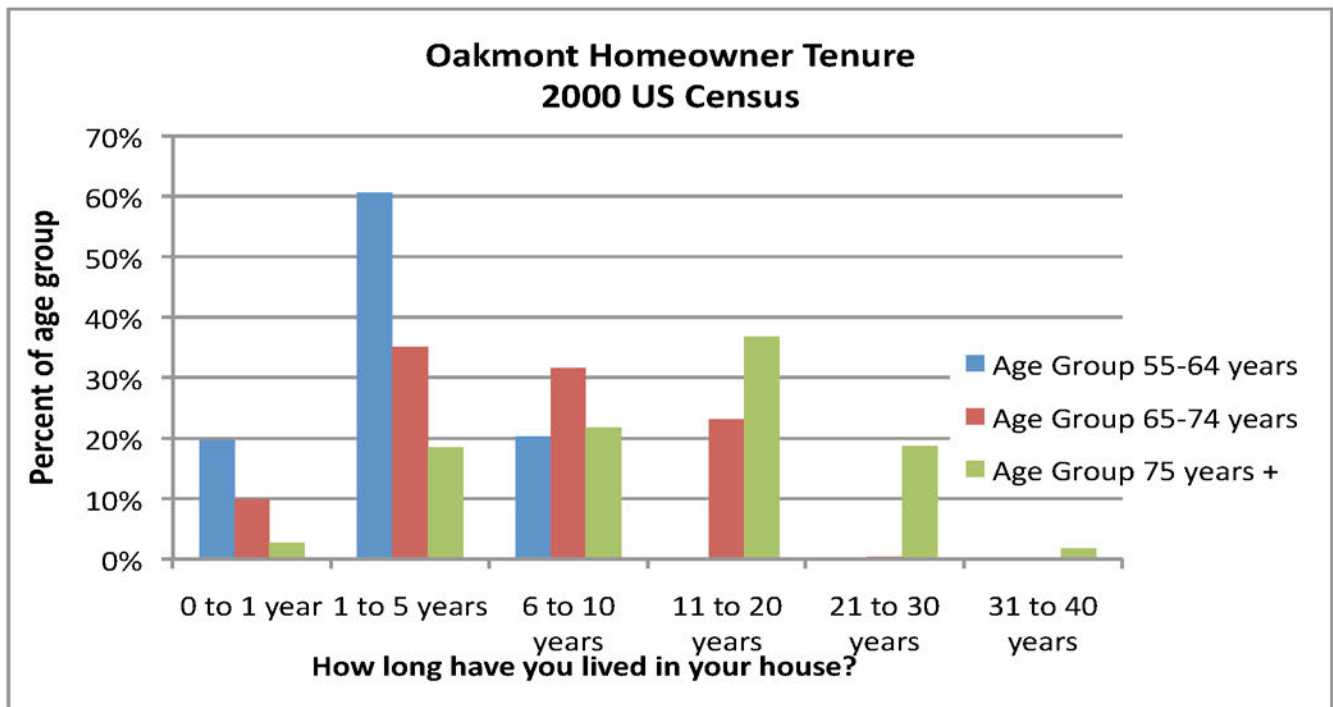
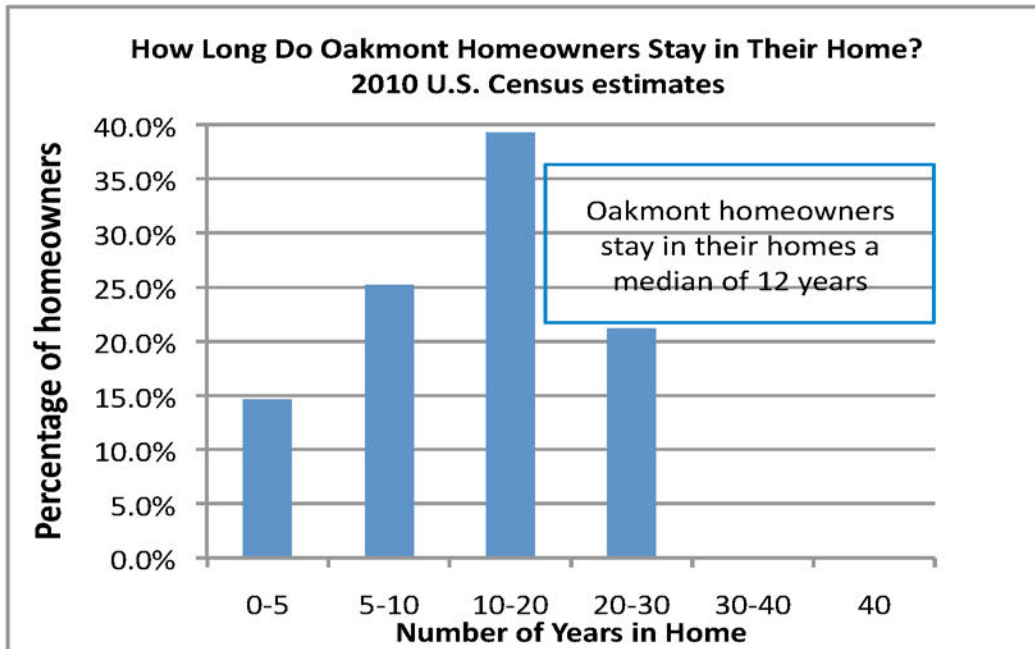
Home Ownership and Tenure

5. About 77% of the homes in Oakmont are owner-occupied. Most of these have only one occupant. Similarly, most of the renter-occupied homes also have only one occupant.



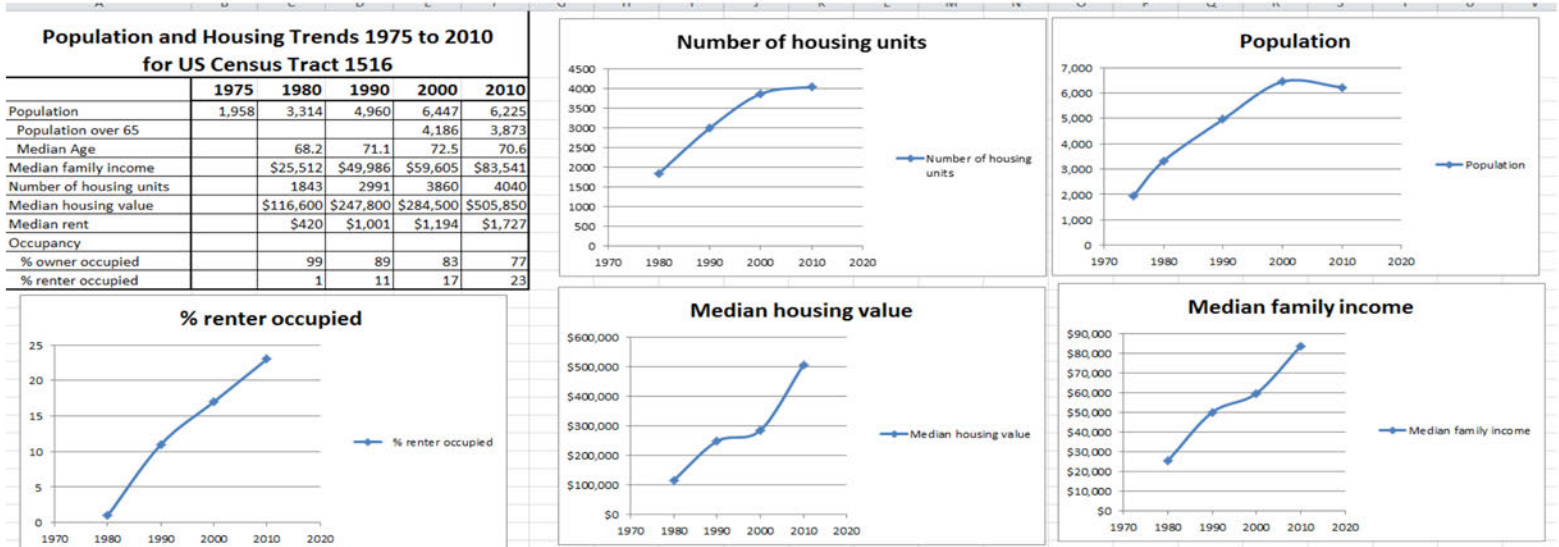
About half of us live alone. Oakmont averages 1.53 residents per occupied dwelling. The owner-occupied homes average only 1.56 residents, while the renter-occupied dwellings average 1.45 residents. By way of comparison, Santa Rosa averages 2.53 residents per owner-occupied dwelling.

6. **Future changes in the Oakmont median age of 76 would take place slowly, if at all.** If you own your home in Oakmont your median tenure in that home is 12 years. If you rent, your tenure in that residence is 8 years, which is twice as high as the median outside of Oakmont. If the median homeowner tenure is 12 years, then the turnover rate should be around $1/12=8\%/year$. If we have an inventory of about 2000 owner occupied homes, then there should be on the average about 160 homes for sale each year in Oakmont. This provides a check with our realtors.



Past Demographic Characteristics

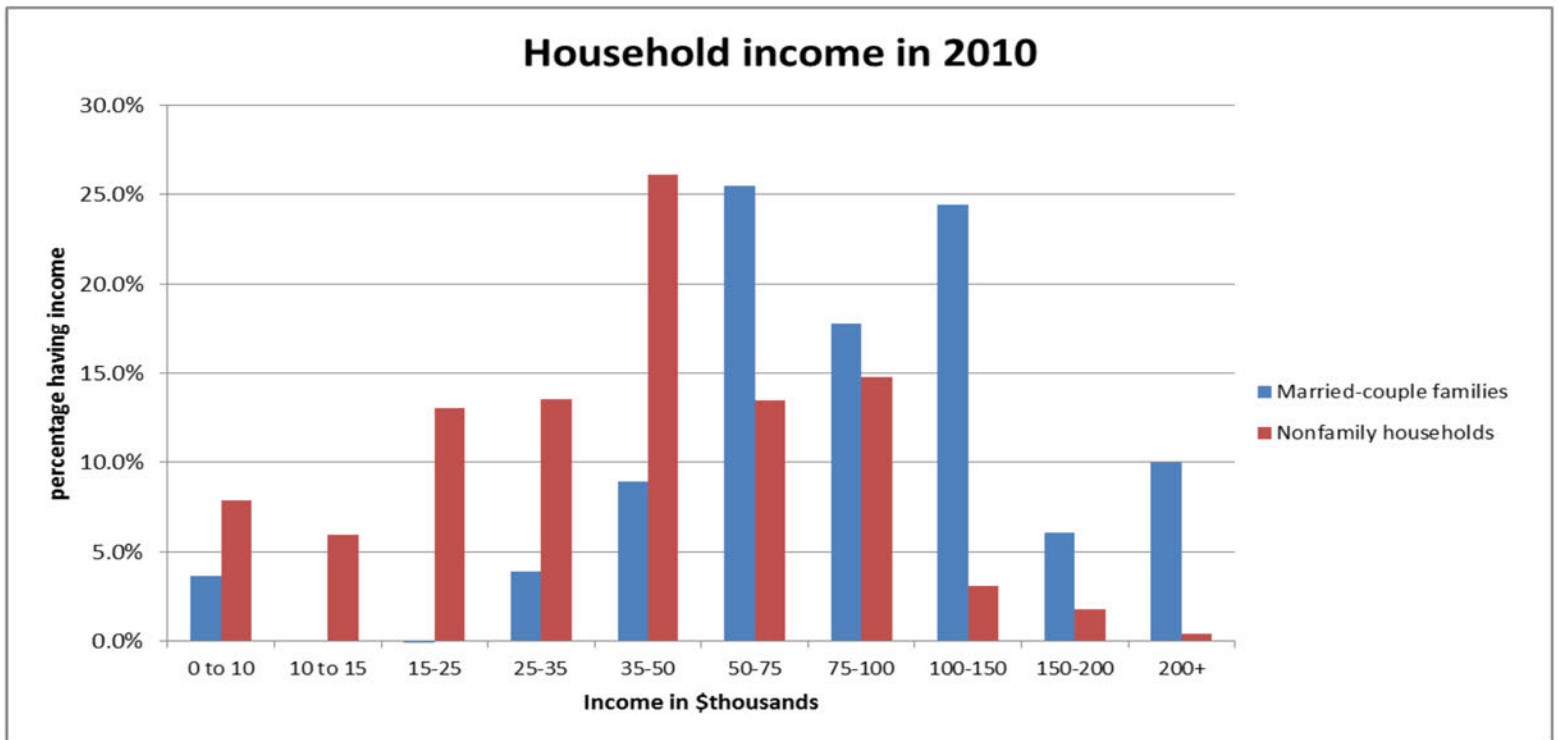
7. After decades of growth, **our population stabilized about 15 years ago**. The figures below are for U.S. Census Tract 1516, which includes Oakmont and an additional 1760 younger non-Oakmont residents. Since Oakmont makes up 72% of CT 1516's population, the general trend of the figures below would also apply to Oakmont. Notice that the percentage of renter-occupied dwellings has climbed steadily from almost zero to about 23% today. This 23% figure includes Oakmont Gardens.



Income and Employment

8. **Oakmont is solidly middle class, and married couples do very well.** The estimated 2010 Oakmont median household income was \$56,000 and the average was \$75,000. Married couple households average over twice the income as persons living alone -- \$87,154 vs \$39,441. Notice in the graph below the differences in the \$100,000+ income, depending upon whether you are a family or "nonfamily household". A "nonfamily household" is either a single person living alone or two or more unrelated people living together.

About 40% of the married couple families had a 2010 income over \$100,000, and 10% of them had incomes over \$200,000. On the other hand, it appears that approximately one quarter of our single residents are living on less than \$25,000 per year. Thus, while the average Oakmont household income is \$75,000, we have many who are doing very well financially and many who are not.



9. **Most Oakmont households receive both Social Security and a pension.** Most retired Americans do not have both, Boomers in particular. In addition, many of us in Oakmont work full-time or part-time and earn on the average over \$70,000 per year from doing it. Less than 2% of us receive public assistance or food stamps.

Only about 14% of the Oakmont residents are in the labor force. However, many of us who work part time in retirement are not counted as “in the labor force”. Of the people in the labor force, roughly 11% of them, about 70, are unemployed. This number is small enough to have a lot of statistical uncertainty; that is, it could just as easily be 5% or 15%.

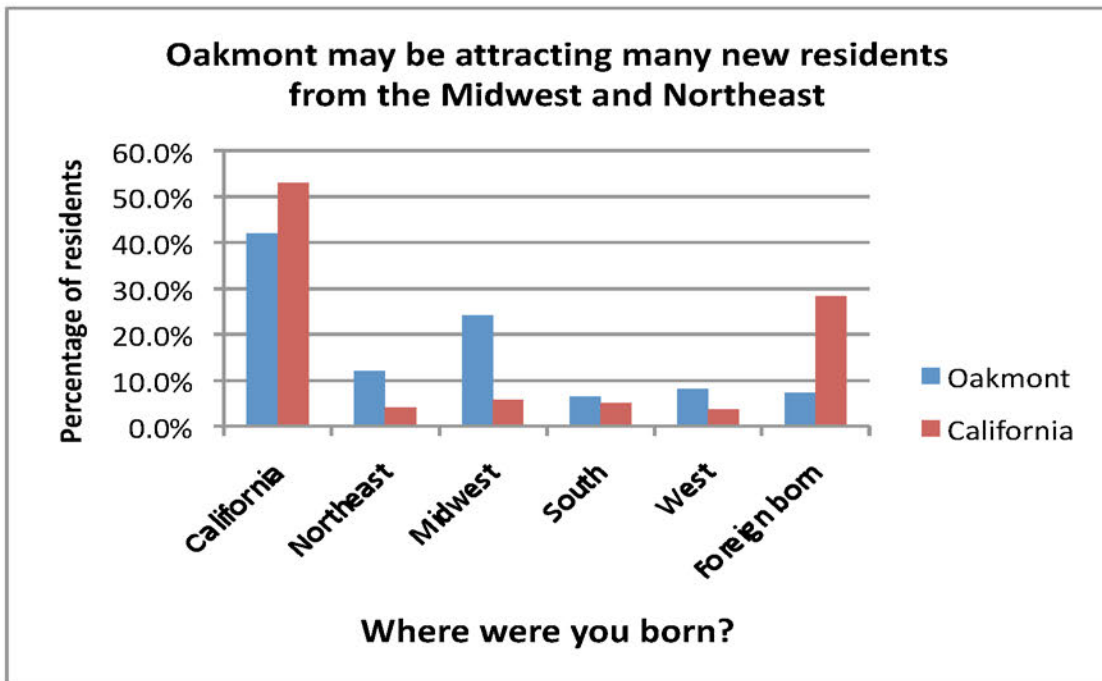
SOURCES OF INCOME FOR OAKMONT RESIDENTS

In 2012 inflation-adjusted dollars

Income Source	Amount	Comments
Per capita income	\$48,295	higher than nationwide average of \$39,791
% of total households with earnings	16%	"Earnings" include wages from full-time or part-time work, investment and rental income, and exercised employer stock options.
% of total households with earnings from self-employment	9%	Many of us continue to do consulting and run a small business in retirement
Mean earnings	\$70,207	
% of total households with Social Security	95%	This estimate suggests that almost every household has at least one person receiving Social Security.
Mean Social Security income	\$19,781	
% of total households with retirement income	61%	Includes defined benefit pension plans such as govt and school pensions. Includes IRAs and defined contribution pension plans such as 401k and 403b.
Mean retirement income	\$30,767	
% of total households with Supplemental Security Income	5%	Aged, disabled, or blind.
Mean Supplemental Security Income	\$18,814	
% of total households with cash public assistance income	1%	
Mean cash public assistance income	\$13,553	
With Food Stamp/SNAP benefits in the past 12 months	1%	
Population 16 years and over		
Not in labor force	86%	
In labor force	14%	
Employed	13%	
Unemployed	11%	Only about 14% of the Oakmont residents are in the labor force. Of these people, roughly 11% of them are unemployed.

Where do Oakmont's Residents Come From?

10. **Oakmont appears to draw most new residents from California, with significant numbers from the Midwest and Northeast.** The Census Bureau does not collect data on, "Where did you move to Oakmont from", so the chart below serves as an imperfect surrogate for that question. It provides the place of birth for the Oakmont residents and compares it to the rest of California. Over 36% of Oakmont's residents were born in the Midwest and Northeast, compared to less than 10% of California's residents. Compared to California, Oakmont has fewer foreign born residents.



Attachment F-Dues Research (Current as of 2019)

Community	Location	Assoc. Fees	HOA Fees	Total Fees
Sun City	Menifee, CA	\$25/month	\$155-\$200/month	\$25 - \$200/month
Jess Ranch	Apple Valley, CA	\$55- \$320/month	N/A	\$55- \$320/month
Oakmont Village	Santa Rosa, CA	\$63.00/month	\$30 - \$280/month	\$63-\$343/month
The Oasis	Menifee, CA	N/A	\$75 - \$185/month	\$75 - \$185/month
Sun City Lincoln Hills	Lincoln, CA	N/A	\$107 - \$321/month	\$107 - \$321/month
Triology at Rio Vista	Rio Vista, CA	N/A	\$125/month	\$125/month
Sun City Roseville	Roseville, CA	N/A	\$456/quarter (\$152/month)	\$152/month
Woodbridge	Manteca, CA	N/A	\$162/month	\$162/month
Solera at Oak Valley Greens	Beaumont, CA	N/A	\$182/month	\$182/month
Sun City Apple Valley	Apple Valley, CA	N/A	\$184/month	\$184/month
The Colony	Murrieta, CA	\$200/month	N/A	\$200/month
Sun City Shadow Hills	Indio, CA	N/A	\$217/month	\$217/month
Four Seasons at Beaumont	Beaumont, CA	\$226-\$299/month	N/A	\$226-\$299/month
Sun Lakes Country Club	Banning, CA	\$235/month	\$140 - \$150/month	\$235 - \$385/month
Trilogy at Glen Ivy	Corona, CA	\$256/month	\$108-\$132/month	\$256-\$388/month
Sun City Palm Desert	Palm Desert, CA	\$239/month	\$30/month	\$269/month
Triology at the Vineyards	Brentwood, Ca	N/A	\$272/month	\$272/month
Leisure World Seal Beach	Seal Beach, CA	N/A	\$284 - \$361/month	\$284 - \$361/month
Triology at La Quinta	La Quinta, CA	N/A	\$288/month	\$288/month
Oceana	Oceanside, CA	N/A	\$290-\$325/month	\$290-\$325/month
Triology at Monarch Dunes	Nipomo, CA	N/A	\$315 - \$479/month	\$315 - \$479/month
Casta del Sol	Mission Viejo, CA	\$325-\$330/month	\$15-\$19/month	\$325-\$349/month
Friendly Valley	Newhall, CA	N/A	\$336 - \$364/month	\$336 - \$364/month
Heritage Palms Country Club	Indo, CA	N/A	\$350/month	\$350/month
The Villages Golf and Country Club	San Jose, CA	N/A	\$350 - \$650/month	\$350 - \$650/month
Leisure Village	Camarillo, CA	N/A	\$353-\$533 /month	\$353-\$533 /month
Indian Ridge Country Club	Palm Desert, CA	N/A	\$415 - \$776/month	\$415 - \$776/month
Ocean Hills Country Club	Oceanside, CA	N/A	\$438 - \$448/month	\$438 - \$448/month
Laguna Woods Village	Laguna Woods, CA	\$528/month	\$11 - \$300/month	\$539-\$828/month
Rossmoor	Walnut Creek, CA	\$550/mo	up to \$250/mo	\$550 - \$800/month

Attachment G

February 2020 Central Area Project Framing Workshop

OAKMONT
IN THE VALLEY OF THE MOON



Earlier OVA Work

2014-2015: **Berger Improvement Committee (BIC)**

- Studied 5 Options.

2016- 2017: **Central Planning Committee (CPC)**

- Studied Space Utilization at Rec Centers.
- Incorporated User Wishes/Comments

2017-2018: **Berger Action Committee (BAC)**

- Presented Implementation Options

OAKMONT
IN THE VALLEY OF THE MOON

Berger Improvement Committee

Studied **Five Options:**

1. Cosmetic Update
2. Modernize Existing Center
3. Reconfigure and Modernize
4. Modernize and Expand
5. New Berger

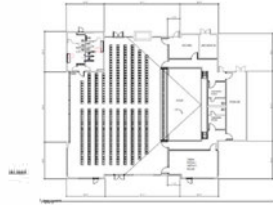
BIC did a good job with the planning process.



Berger Action Committee focus: **Options 4 & 5**

OAKMONT
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Berger Action Committee Charter



- Develop **Schematic Designs & Cost Estimates** for “Remodel” and “New Building” by December 2017.
- **Maximize Flexibility** of Space.
- Plan Strategies to **Minimize Downtime** During Construction.
- Recommend **Consultants and Contractors**.
- Outline Process, Timeline, and Methodology to Accomplish Goals.

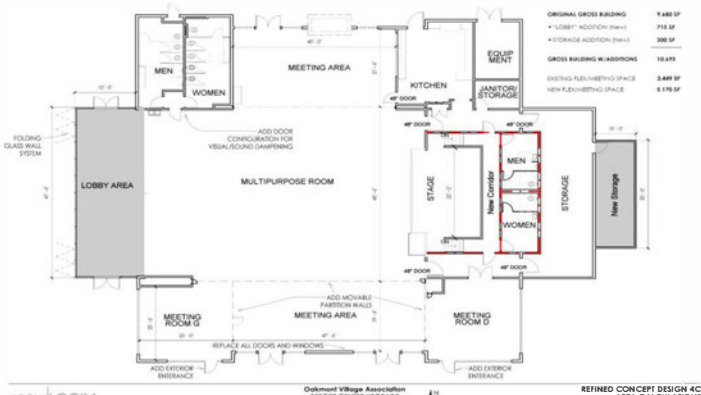
OAKMONT
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Berger Action Committee February 2018

- Evacuation and fires of October 2017 impeded efforts and **delayed report**.
- Addressed “**Remodel**” with preliminary estimates.
- Outlined “**New Berger**” options (with alternatives), including some estimate data.
- **Pre-fire cost estimate data** was unreliable.
- Issues with **parking, ADA**, and other factors were considered, but unresolved.
- **Soft costs, contingencies**, and estimates based on **specific bids** were not available.

OAKMONT
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Berger Action Committee “Remodel”



OAKMONT
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Berger Action Committee “Remodel”

- **New Lobby** adds 700 Ft² of Space, with a Folding Glass Wall to Enhance Berger Center.
- **Improved Flexibility** and Increased Size:
 - Remodeled Berger: 5,170 Ft² Flex Space
 - Existing Berger: 3,449 Ft² Flex Space
- New Hardwood Floor, Hearing Loop, Doors & Windows
- Meeting Rooms Reconfigured with Partitions
- Kitchen Enhanced and Stage Remodeled
- Restrooms Updated and Storage Increased

Estimated cost (2017 estimates): **\$3.6M**

OVA Central Area-Phase One Project Framing Workshop (Cont) And Berger Action Committee Report Chart

OAKMONT IN THE VALLEY OF THE MOON Berger Action Committee "New Building"

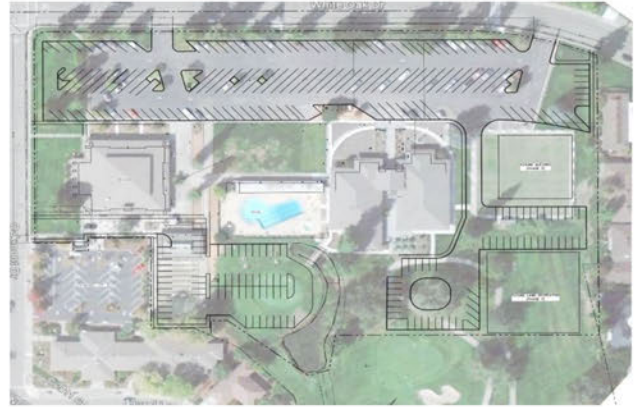
Substantial work was done defining options, including:

- Demolish Berger and rebuild at same location.
- Demolish Berger and rebuild at another location.
- Repurpose Berger and build new center at another location.

All alternatives presented complications:

- Increased parking requirements
- Disruptions in access and use
- Other problems

OAKMONT IN THE VALLEY OF THE MOON Berger Action Committee "New Building"



OAKMONT IN THE VALLEY OF THE MOON Berger Action Committee "New Building"

- Assessment and costs for all alternatives used "best effort," but incomplete estimation data.
- Each option was based on requirements assumptions that are subject (and certain) to change.
- Most estimates were done using information assembled before the 2017 fires.

Estimated cost (2017, preliminary estimates): **\$4.7 to 5.4M**

OAKMONT IN THE VALLEY OF THE MOON Building Construction Committee—2018

- Presented specifications and most plans for the **East Recreation Center renovation** to OVA Board in April.
- Recommended **deferring Central Area efforts** (with one exception) until after ERC project was complete.
- Continued work on **Berger Center seismic assessment and remediation** (completed in 2019).

OAKMONT IN THE VALLEY OF THE MOON Long Range Planning Committee

Based on current surveys and discussions, LRPC recommends for the central area:

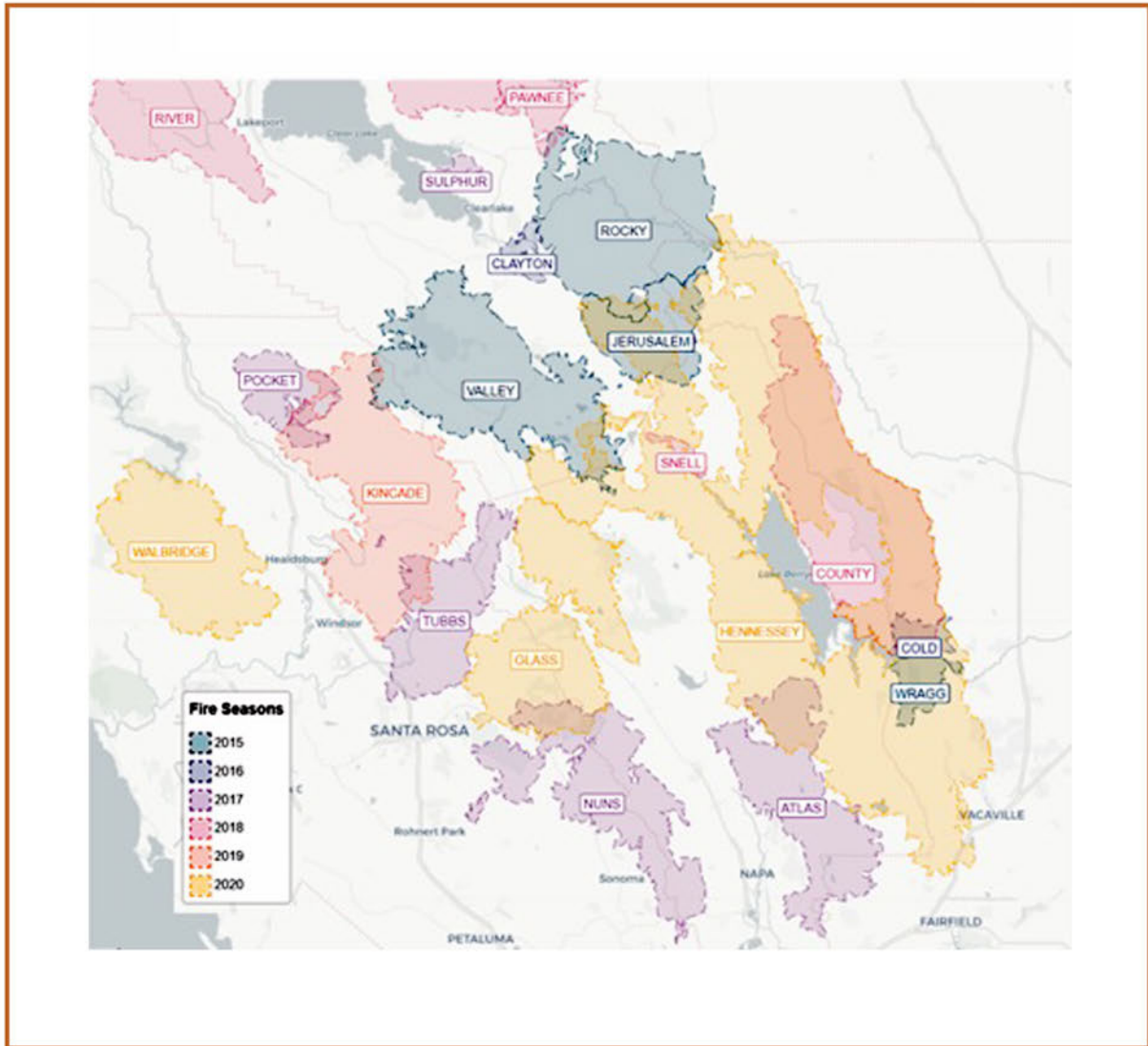
- Hire an **architectural planner** to consider options for the greater complex.
- Keep **LEED certification** in mind for all work.
- Build for **OVA's future**.
- Ensure that the central complex includes ample space to accommodate **existing and future** activities.

OAKMONT IN THE VALLEY OF THE MOON Long Range Planning Committee—Priorities

- 1a. Main auditorium (stage/theater to seat 500)
- 1b. Larger multipurpose flat wood floor (larger than existing Berger flat floor)
2. Permanent gathering place (seating, coffee, etc.)
- 3a. Additional conference rooms of varying sizes
- 3b. Expanded Fitness Center (double existing size)
4. Enhanced craft/art room (working space, cubicles)
5. Expanded library (quiet seating areas, meeting room for book clubs)
6. Caterer's kitchen
7. OVA offices

Attachment H

Oakmont Fire Map



Attachment I

Fall 2020 Club Survey – Executive Summary

Background

A survey of Oakmont clubs was conducted in fall 2020 before the onset of the Covid-19 pandemic. The survey was sent to all Oakmont club presidents (or representatives) and focused on the general activities of the clubs. A key focus of the survey was the use and utilization of Oakmont facilities. This report also makes use of records maintained by Anita Roraus. These records focus on number of events and general utilization of spaces such as the Berger Center, the Central Activities Center, the East Recreation Center, and the West Recreation Center. Finally, this summary makes use of a draft report by Jeff Young and a summary of the survey by Colin Hannigan.

The following table gives average club size and average attendance of 98 respondents:

Quartiles	Club Size	Average Attendance
	Range	Range
1 (24 clubs)	100 and above	45 to 150
2 (25 clubs)	40 to 99	45 to 23
3 (25 clubs)	16 to 39	22 to 12
4 (24 clubs)	Less than 39	12 to 0
98 Total		

Nearly half of the clubs reported that they are growing—45 of 98 responses. And 44 respondents indicated that they would like to invite non-residents of Oakmont to selected events.

Capacity of Meeting Rooms

As background, the following table summarizes the capacity of meeting rooms in the Oakmont facilities.

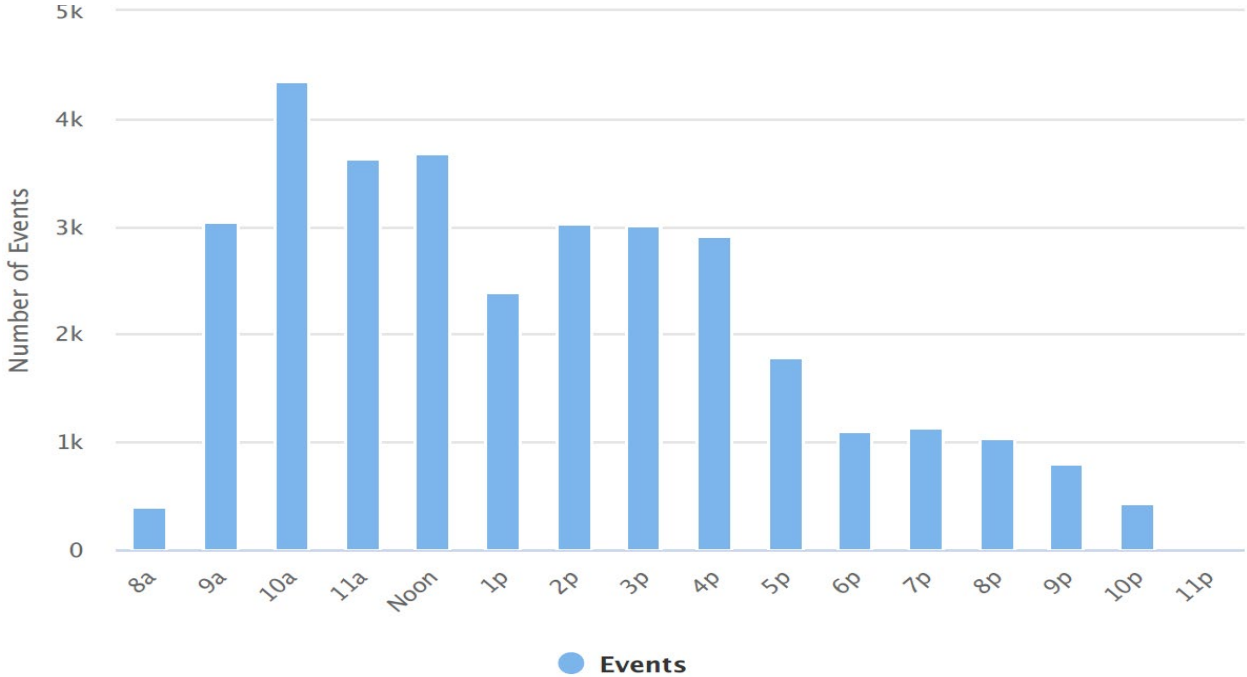
According to OVA estimates, the following rooms are being scheduled for events:

Meeting Room	Capacity	Meeting Room	Capacity
Berger Center	337	East Recreation Center Main	120
Room D	25	East Recreation Center Conference Room	30
Room G	25	West Recreation Center Upper	117
Fireside		West Recreation Center Lower	25
Central Activities Center		OVA Large Conference Room 1	12
Room B	30	OVA Large Conference Room 2	12
Art Room	23	Manager Conference Room	7
Card Room (A & B)	52	OVA Suite B	35

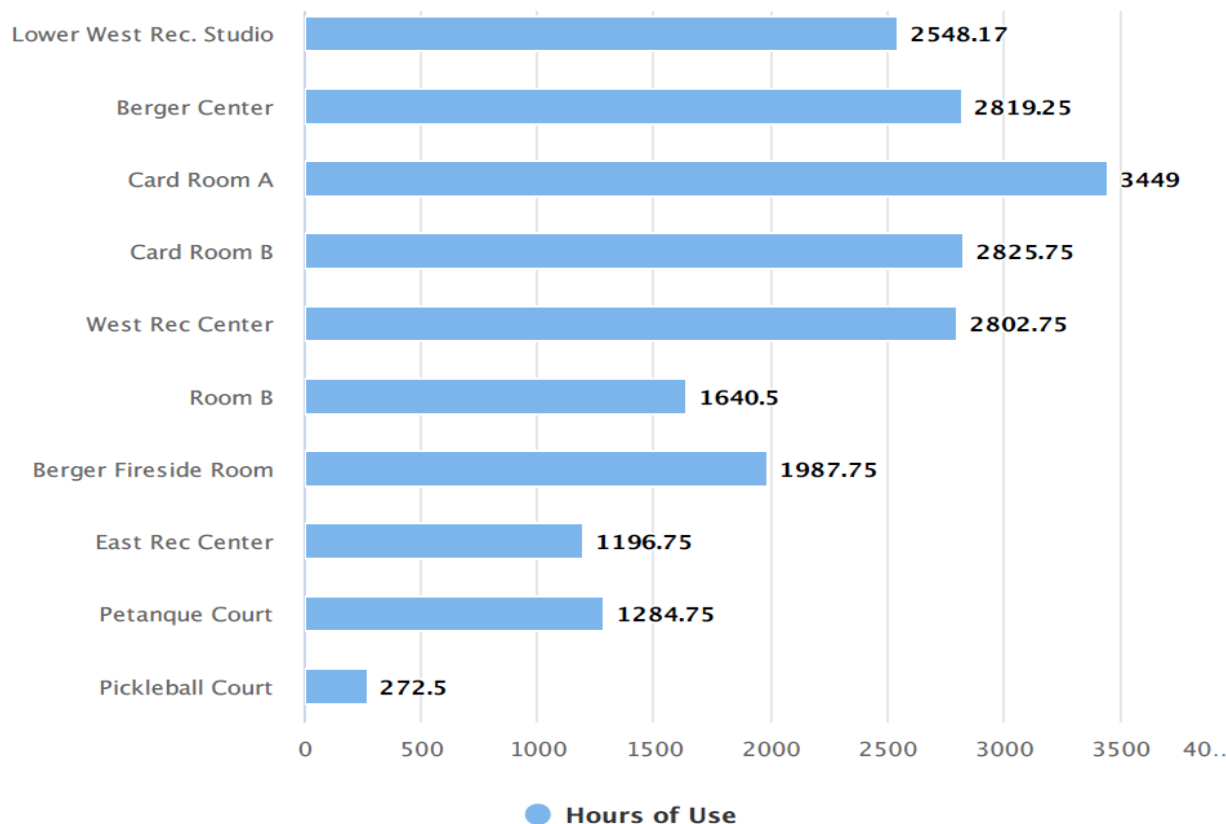
Fall 2020 Club Survey – Executive Summary

Utilization

Another useful view is to examine the number of events scheduled in 2018-19 and the utilization of space by time of day. OVA staff shared these results.



Fall 2020 Club Survey – Executive Summary



The data show that utilization is at its greatest from 9am to noon followed by another lesser peak from 2pm to 4pm. It should be noted that “availability of the preferred facility” was a problem for 22 of 98 responses. Additionally, more than 60 clubs reported that utilization requires a specific layout or set-up. This is important because it needs to be factored into room turnover as staff would be required to clean and rearrange spaces to meet needs. For multifunctional spaces this can impact availability on any given day—that is to say these spaces cannot be scheduled in back-to-back fashion.

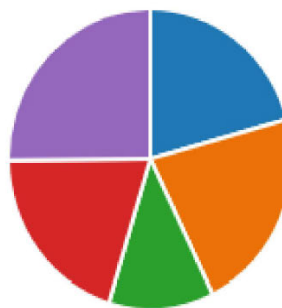
Distribution of Space Use

The following charts reflect use of the various Oakmont facilities. The Berger, CAC, and East Recreation Center showed the greatest overall use. Weekly and monthly use account for 42% of the bookings at Berger compared to 79%, 70%, and 53% for CAC, West Rec and East Rec respectively. Seasonally use is highest for Berger with about one-third of bookings made on a seasonal basis. Further, 85% of the club respondents reported “that they do NOT have to turn away members due to lack of space.”

Fall 2020 Club Survey – Executive Summary

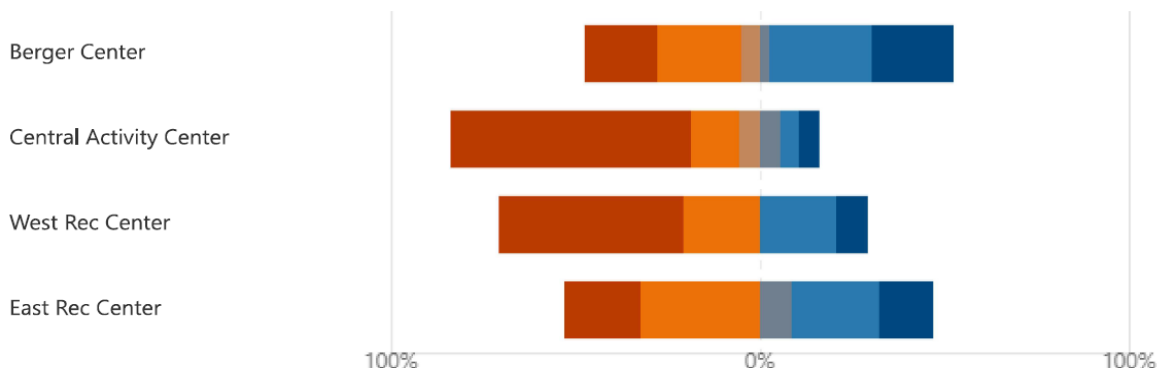
5. Which of these OVA facilities does your club use? (check all that apply)

● Berger Center (auditorium, Ro...	33
● Central Activity Center (Gym, ...	35
● West Rec Center (Lower floor ...	19
● East Rec Center (Main confere...	32
● Other	40



6. How often does your club use any given facility?

■ Weekly
 ■ Monthly
 ■ Bi-Monthly
 ■ Quarterly
 ■ Seasonally
 ■ Yearly



Summary

The results indicate that current use demonstrates a peak-load space shortage with stiff competition for spaces at preferred times of the day. Additionally, with nearly half of the clubs reporting growth in attendance, demand for space will become more acute.

So, in summary:

1. The number of clubs within Oakmont is currently 161, and the data show that space at optimal times/days is near capacity.
2. The number of clubs has been growing, on average, at a rate of 5.5 net new clubs per year since 2003.
3. As new clubs are added each year, OVA staff will face mounting pressure to find optimal times and space for meetings and events.
4. There is strong interest in the community of not only growing the number of clubs, but growing the size of some clubs, including the desire by some club leaders to invite non-Oakmont residents to selected events.

Attachment J

Elnoki Map



Elnoki Map Zoomed In

