



## Oakmont 2030 Activity Status

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### **Executive Summary**

This report summarizes the current findings for Oakmont 2030 Steering Committee concerning activities and findings through January 2023. From well-attended “Community Conversation” Meetings in summer 2022 and OVA member-led working groups last fall, about 200 concepts emerged for potential further study and, eventually, possible future action. Because it is impossible to do “Everything Everywhere All at Once,” except in the movies, we have selected and listed below a subset of these ideas for current attention. Concepts not included for initial focus will be kept on the Oakmont 2030 website and will be reviewed later for further consideration.

To start the selection process, the ideas were grouped into one of four categories:

- Short-term actionable
- Short-term requiring resources
- Long-term low-investment
- Long-term high-investment

We then developed a provisional rank-ordering for the ideas in each of these categories based on criteria developed by an OVA volunteer committee and weighted them using priorities provided by participants of the working groups. The 2030 committee recommends the top prioritized items that are listed below for further study. Some concepts here will need little additional exploration, while others will require substantial effort involving outside consultants and possible future community conversations, surveys, and other activities.

This further study may lead to proposals to the OVA Board of Directors for future action, development of additional concepts for consideration, or recognition that there is insufficient merit for further attention.

A summary of 2030 activities to date and other detail follows the recommendations. The recommendations are grouped according to the ten themes that emerged during the Oakmont Today and Oakmont Tomorrow Community Conversations.

## Ideas Proposed for Further Attention

**Theme A: Oakmont is a safe community with ongoing consideration and concern for the safety of its residents. It is a fire-safe community, including smart and attractive landscaping and sufficient routes for evacuation.**

### Long Term Proposal

1. Develop Multiple Evacuation Routes: Working with City and County officials to widen Hwy 12 and establish multiple, alternate evacuation routes: Stonebridge to 12; Stonebridge through Elnoka to Melita; Oak Leaf to Hwy 12; Frey Rd Area Exit to Hwy 12, off Hood Mtn Circle through vineyards to private road off Frey Rd.

### Short Term Proposals

1. Evacuation Education: Create a Safety Education Committee which will research, organize, and prepare safety educational offerings to inform and educate community members including resident owners, renters, absentee owners, and staff.
2. New Resident Binder on emergency preparedness: Create a new resident binder with general information as well as emergency preparedness to educate new & existing residents on emergency preparedness & safe evacuation.
3. Unify MYN and COPE: Consolidate MYN and COPE and recruit more OEPC, COPE, and MYN volunteers/ neighborhood leaders.

**Theme B: Oakmont maintains and updates Oakmont facilities to enhance their utility while managing costs and ensuring affordability.**

### Short Term Proposals

1. Technology Enhancements for Meeting Spaces: A Portable Zoom Station that can be moved between meeting rooms. The Central Activities Center (CAC), Berger, East Recreation Center, and West Recreation Center should have Zoom capabilities and modernized AV technology.
2. Improve Meeting Space Management: Rotate Club Meetings for Space Utilization, automate reminders to clubs on meeting times and spaces, develop web- based app for space utilization. Consider having clubs hold meetings on a rotating basis (time-wise) so that multiple clubs can have meetings at preferable times.

**Theme C: Oakmont provides spacious and comfortable spaces to meet informally, talk, or have a cup of coffee, both indoors and outdoors.**

### **Long Term Proposal**

1. CAC Improvements: Enhance CAC patio and remodel CAC and outdoor space; create an indoor and outdoor facility or coffee shop; increase shaded outdoor near our pools; create path to access patio without going through the CAC; cover the mulched space in front of the CAC to create a meeting space.

**Theme D: Oakmont has enhanced overall access to Oakmont information on activities, events, news, and OVA matters.**

### **Short Term Proposals**

1. Create a Resource Office: The Resource Office would coordinate educational emergency-preparedness resources and provide information to residents. This office will focus on disaster planning, evacuations, and sheltering in place.
2. Create and Distribute a Communications Needs Assessment Survey: Possible questions include: How do you learn about Oakmont events, news, and activities? Digital? Newspaper? What do you want? What is missing for you?)

**Theme E: Oakmont has a broad offering of retail shops and services in Oakmont's Village Center.**

### **Long Term Proposal**

1. Increase Businesses in Oakmont: Encourage more businesses (e.g., drug stores, hair salons, gas stations, health care providers, veterinarians) to provide services to Oakmont residences.

### **Short Term Proposal**

1. Expand/Broaden the Commercial Offerings in Oakmont: Get resident input on the types of commercial retail and services desired or needed in Oakmont; identify potential local Commercial Properties (and owners) and reach out to those commercial owners and business stakeholders.

**Theme F: Oakmont is a proactive, environmental community including such things as long-term water conservation and drought responses, energy reliance, green space, and fire resistance.**

### **Long Term Proposals**

1. Water Management: Capture rainwater to increase groundwater supply for use on OVA-owned properties or individual homes; consider partial damming of creeks during fire season; optimize water savings throughout Oakmont.
2. Greywater Infrastructure: Support for greywater infrastructure to irrigate landscaping.
3. Independent Solar Grid: All OVA buildings, including golf course properties, and pools run on solar energy. Oakmont homes are on the solar grid as well.
4. Establish Community-Wide WiFi: Upgrade Internet access speed/options, fiber optic. Community WiFi, perhaps Comcast cable, for all residences.

### **Short Term Proposals**

1. Environmental Education: Oakmont provides educational opportunities for all community members on environmental issues including solar, batteries, Electric vehicles (EV), heat pumps; recycling (including plastic), and landscape/habitat issue for homes, common areas and bordering waterways, including lawns.
2. Santa Rosa City Council Activism: Become involved with Santa Rosa government, supporting initiatives that positively impact Oakmont and opposing those that don't.
3. Oakmont Community Microgrid Support: Increase support for Oakmont Community Microgrid through education seminars and town halls.
4. Work to Lower Costs for Landscape Materials for Residents: Create consortium to obtain lower costs for landscape material for Oakmont members.

**Theme G: Oakmont has long-term viability and leadership of Sub-Associations within Oakmont.**

**Long Term Proposal**

1. Standardization of Sub-HOA Governing Documents: Address defects in the original Sub-HOA designs; combine some Sub-HOAs with common characteristics; obtain legal resources to investigate combining all HOAs into one association.

**Short Term Proposal**

1. Sub-HOA Committee: Establish an OVA standing committee to advise board on Sub-HOA matters.

**Theme H: Oakmont has adequate space for clubs, events, organizations, and sports groups, and enhancing systems for access and visibility with options for providing new spaces for future activities and amenities**

**Long Term Proposals**

1. Support Additional Sports: Designate/Repurpose areas for sports not currently available in Oakmont, such as more courts for pickleball, croquet, badminton, volleyball and basketball. Some spaces could be shared, like badminton, volleyball, and croquet.
2. CAC Patio Improvements: Create an indoor and outdoor facility or coffee shop by covering the CAC patio; Increase shaded outdoor space near our pools; create path to access patio without going through the CAC; cover the mulched space in front of the CAC to be a meeting space.
3. Remodel/Repurpose/Reallocate Spaces of Central Activity Center for improved utilization: Consider enlarging the gym; expanding the art room to accommodate larger-scale projects, such as wood working, clay work, sculpture, ceramics, glass work, a possible kiln; expand the library.
4. CAC Swimming Pool Expansion: A new swimming complex to include consideration of: an area for rehabilitation (assisted water walking and a lift); a covered area of the pool; standard lane lengths for swimming laps (25 yards or 25 meters); a shallow constant-depth pool with railings and options for assistive devices. Consider hiring a Masters Swim Coach for individual instruction and more effective lane usage.

5. Acquire or Lease Additional Space for OVA Offices, Events, and Activities: Lease/buy additional space. Lease could extend to purchase and major remodel. New construction would include a larger event center, including a "student union" for socializing with additional activity space. Consider purchase of additional land.

**THEME I: Oakmont is an age- and income-diverse community, supporting members of varying ages, income levels, and residency status, and enhancing our ability to age in place.**

### **Short Term Proposals**

1. Aging in Place Committee: Establish a standing Board Committee that would be responsible for reviewing, evaluating, and delegating services related to aging in place.
2. Build a Services Resource Sheet: Build a resources sheet of available services; e.g., Volunteer Helpers, Learning Center, Meals on Wheels, Grant Aide).
3. A Telecare System, Circles of Care: Develop a Telecare system, daily phone calls to check-in on residents who agree to this program to confirm they are all right. Circles of Care are groups of residents who can provide support for those residents struggling with issues of health, loss, home safety, etc. Increase availability of Mental Health support.

**THEME J: Oakmont is financially stable and explores creative funding sources in addition to dues.**

### **Long Term Proposals**

1. Oakmont has multiple sources of potential financial resources: Solicit charitable contributions aligned with specific projects, such as fire and flood, education; seek tax-deductible donations through established organizations such as Oakmont Community Foundation (OCF) or new 501(c)(3) organizations; investigate private bond financing as a potentially lower-cost source of borrowed funds.
2. New Development of OVA Property: Identify parcels of OVA-owned land that could be rezoned and sold to developers for future residences, also generating "developer fees."

## Summary of 2030 Activities to Date

The 2030 Steering Committee is a subcommittee of the OVA Long Range Planning Committee.

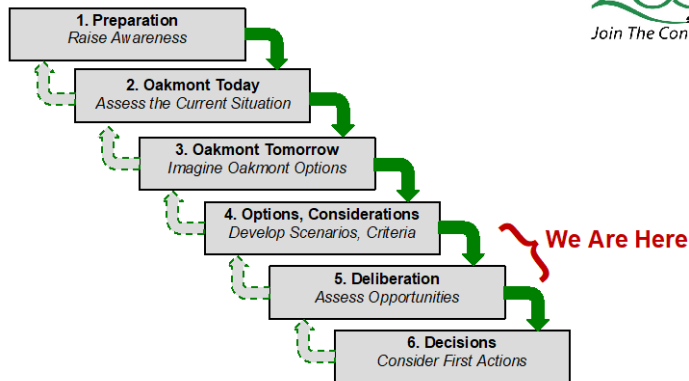
It evolved from the Ad Hoc Central Complex Committee (CCC) that was established in May 2020 by the OVA Board as a Phase Two activity of the OVA Five-Phase Project Management Process. Phase Two efforts involve no building or construction.

The committee's goal was to generate possibilities for future consideration based on community input to work with the City of Santa Rosa and outside professionals to develop "different but doable" alternatives for the central area of Oakmont. After looking at the issues, the scope of the Committee was changed to include adjacent commercial and business properties and OVA-owned undeveloped parcels.

Initial work to partner with the American Institute of Architects' Sustainable Design Assessment Team (SDAT) faltered with the outbreak of COVID and the inability to hold public meetings to garner community input. In 2021, the CCC became a subcommittee of the Long-Range Planning Committee, renamed Oakmont 2030. (See the CCC Fact Finding Report at <https://oakmontvillage.com/article/central-complex-committee-fact-finding-report> for additional detail.)

In February 2022, Keyring Consulting was hired in lieu of AIA to assist Oakmont 2030 to develop a roadmap for obtaining community input on Oakmont's future. Sarah Lightfoot, owner, has expertise in designing and facilitating meetings to help guide people through complex issues to results. With her help, 2030 adopted a Community Conversation model, where, unlike a regular Town Hall, every participant is given the opportunity to express his or her opinion and see how that opinion fits in with other people in the room. Every comment is collected and organized and put back into the room for the participants to see. In addition, Ms. Lightfoot helped the Steering Committee develop a roadmap for the 2030 process which was presented at every 2030 meeting. Preparation was step 1, through last spring. The community conversations last summer were steps 2 and 3. Working group and current committee activities are currently underway as steps 4 and 5.

## Oakmont 2030 Roadmap



4

### The Process

In June 2022, small community conversations were held with Club Leaders to verify the effectiveness of the Community Conversation model and to review a 2020 study of space utilization done by the Long-Range Planning Committee.

On June 29, a Town Hall was held both live and on Zoom, to kick-off Oakmont 2030 and to explain the process of obtaining community input. Approximately 225 people attended the June events with Steering Committee members answering approximately 180 questions, either live during the events or later on the website.

In July, over 350 people attended one of six Oakmont Today Community Conversations or four focus groups with realtors and new residents. Over 3,000 comments were recorded and posted on the 2030 website.

In August, seven more Oakmont Tomorrow Community Conversations were held, attracting several hundred people and generating thousands of additional comments.

During the Oakmont Today and Oakmont Tomorrow meetings, approximately 50 volunteers served as Facilitators at small tables to collect responses from participants or as Themers who grouped the comments into themes. Ten such themes were developed that captured the concerns and visions of residents relative to Oakmont's future: Life Safety; Maintenance and Modernization; Gathering Places; Improved Communications; Improved Commercial Area; Environmental Stewardship; SubHOA's; Space for Clubs and Activities; Age and Income Diversity; and, Long-Term Opportunities for Solutions.

### Working Groups

Beginning in October 2022, volunteers were solicited to participate in a Working Group based on these ten themes. Nearly 250 people volunteered to meet for approximately three weeks to

develop “blue sky” proposals for further consideration. The Working Group model was designed to promote “divergent thinking,” to generate as many new ideas as possible.

Over 200 ideas were generated by the Working Groups which were then divided into four categories:

- Short term 1: Immediate: ideas that are actionable now by Board, Staff, or an OVA Committee without much further study or due diligence.
- Short term 2: Requires more study and due diligence to greenlight.
- Long term 3: Requires even more study and due diligence to greenlight (input from community, experts, other stakeholders).
- Long term 4: Qualifies for Board Project Oversight Process (significant investment, planning, and further community input)..

The breakdown between long-term and short-term is shown in the chart below.

	Available Resources	New, Uncertain, or Unknown Resources
Short term (within 2 years)	1: 39 Ideas	2: 94 Ideas
Long-term (3 years, or significantly more)	3: 24 Ideas	4: 42 Ideas

A separate 2030 Working Group met to develop four broad criteria that was used to rank-order the ideas for further assessment and, ultimately, for possible recommended action. On November 16, 2022, dozens of volunteers met to review the draft criteria and helped to establish this relative weighting:

- Measurable benefits (37.7%)
- Expected community alignment and support (33.3%)
- Cost impact on dues and debt, and cost/benefit assessment (16.4%)
- Non-cost consequences (12.6%)

On December 12, 2022, a Town Hall was held to inform the community about the results of the Working Groups and the next steps that would be taken to apply the criteria to the proposals.

The proposals were further reviewed and ranked by the 15 members of the Long-Range Planning Committee and its Oakmont 2030 Steering Subcommittee. In January, 2023, to ensure transparency and community agreement, an additional group of volunteers reviewed the proposals and the rankings. Their comments were incorporated into the final version that is presented above.

Some of the best short-term ideas could soon be presented to OVA staff or a Board Committee for immediate attention. The process for more complex opportunities will take additional time, effort, and thought, but the goal is to progress in an orderly, transparent way, relying on community input through Community Conversations, surveys and other engagement.

In addition to the ideas generated, Oakmont 2030 demonstrated that the Community Conversation model works very well, as a way of working together to discuss and solve community issues that assist in making Oakmont-wide decisions. The meetings were enthusiastically endorsed by the residents who took part in them, and the participants look forward to similar future engagements. Many of the proposals that rose to the top will lend themselves to more discussion by the community through Community Conversations. To help in that effort, 50 volunteers are trained and stand ready for the various roles required to ensure their success.