

to housing, including designating an existing staff member to serve as an aging in place expert/ombudsman at City Hall.

5. Under the direction of Laguna Beach Seniors, a Lifelong Laguna Steering Committee chaired by Kristine Thalman has been meeting monthly since April 21, 2016. This new program of supportive housing services, referrals, and advocacy is in the first phase of a three-year startup process. Workshop/focus groups are planned for early 2017, with initial services to focus on partnering with and amplifying the service efforts of Laguna's nonprofit organizations and congregations who serve older members.

FINAL RECOMMENDATIONS TO THE COUNCIL:

The following recommendations, many of which are already implemented in other coastal cities with aging populations, will allow for a proactive and progressive approach to essential housing services for our senior residents so that they can remain active and engaged in the community they call home.

- A. **Recommendation: Finalize and Implement the Senior Specialist Program at City Hall front desk**

Discussion: This recommendation will create a "one stop" process to simplify and expedite "aging in place" home improvements that could range from simple grab bars, to bathroom renovations, elevators, and ramps. The City would identify a current staff person to serve two hours a week at a specified time in this capacity, with a dedicated phone line. The staff person will also work closely with social workers at the Senior Center in making home visits to determine the residential modification needs of frail and/or handicapped seniors. The program would be promoted through a brochure and press release.

Fiscal Impact: Minimal. Reallocates existing staff resources. Some minimal marketing costs.

- B. **Recommendation: Create an amortization/abatement agreement process that would promote the legalization of nonconforming units, with accompanying deed restrictions.**

Discussion: Due to the nature of the City's aging housing stock, there are many illegal nonconforming units that functionally contribute to the City's affordable rental housing. But when they come to the attention of Code Enforcement, staff is required to address the nonconformance, which in some cases may see the loss of the more affordable unit and eviction of the tenant. In some cases, the City has entered into an amortization/abatement agreement to allow the unit to remain for a certain period of time. With the implementation of this recommendation, staff would develop a draft amortization/abatement agreement process for City Council consideration. The process would determine who will be affected when tenants of an illegal nonconforming unit are subject to eviction. When those tenants are seniors, the policy will ensure that these tenants are given special consideration, including the possibility of remaining in the unit. The policy should also consider the

possibility of legalizing the unit through a density bonus, with accompanying deed restrictions, in order to create a new affordable senior housing unit.

Fiscal Impact: Minimal.

C. Recommendation: Implement the State Housing Ordinance, which includes the Density Bonus Law.

Discussion: The State's Density Bonus Law allows for higher density than permitted when a certain percentage of the units are deed restricted to provide low or moderate income housing. The Density Bonus Law also allows for incentives/concessions when affordable units are provided onsite. These State provisions have not yet been adopted into our Municipal Code, and thus is basically a simple housekeeping action.

Fiscal Impact: None.

D. Recommendation: Explore the feasibility of allowing second units on lots smaller than 6000 square feet, when units are deed restricted to low-income seniors.

Discussion: Under the City's second unit ordinance, 25 second units have been built in Laguna, but only one owner has opted to deed restrict the unit to an affordable unit to avoid off-street parking requirements as permitted in the Code. Given the number of smaller lots (less than 6,000 square feet) in Laguna, the Task Force believes that more owners might create affordable second units with deed restrictions if the option was available. The Task Force recognizes that such a decision requires research and analysis as well as consideration by the Design Review Board and Planning Commission before coming to the Council.

Fiscal Impact: None.

E. Recommendation: The Housing and Human Services Committee's Preservation At-Risk Units Subcommittee will continue to monitor the status of existing Section 8 and equivalent senior housing.

Discussion: The Task Force believes that the tools are in place to maintain very-low income senior housing at Harbor Cove, Vista Aliso, and elsewhere. However, this may not prevent efforts to convert these units to market rate rentals, and the subcommittee should continue to monitor these properties.

Additionally, the Task Force encourages the Housing and Human Services Committee to engage in a dialogue with the management and board of Hagan Place. This 25-unit Section 8 housing program opened in the 1990s to provide urgently needed housing for low income, HIV-disabled individuals. With HIV/AIDS having become a manageable disease, there may be an opportunity to expand the resident criteria to include people with age-related and other disabilities.

Fiscal Impact: None.

F. Recommendation: Develop a Senior Housing Repair Program, Utilizing the Housing In-lieu Fund

Discussion: Our best option for preserving and adding affordable senior housing in Laguna is by preserving and modifying Laguna's existing housing stock. This recommended program, which is modeled on a similar program in Newport Beach, would (1) help low-to-moderate income senior homeowners in need of critical home repairs, or modifications due to accessibility needs, safety concerns, health and well-being, or citation by Code Enforcement; (2) help low-to-moderate income homeowners with an illegal nonconforming second unit that is in need of repairs or modifications to meet code enforcement standards for affordable senior rental units.

Recommended Eligibility Requirements: Laguna Beach residents age 60+ that are low-to-moderate income homeowners, who are living in a home in need of critical repairs or aging-in-place modifications; applicant must be unable to perform the repairs or modifications themselves; applicant must be unable to afford to pay a market rate contractor to complete the repairs; applicant must be willing to work with City staff; the cost of the repair work will be recovered via a lien on the property when it is sold; applicants seeking to create, upgrade, and legalize a nonconforming second unit must be willing to deed restrict their property for the purpose of affordable senior housing.

In implementing this program, the City should consider working with other agencies, such as Habitat for Humanity, and volunteers from BIA and local Board of Realtors.

Fiscal Impact: No new revenue sources required. There will be no net loss over time, as withdrawals from the Housing In-lieu Fund will be replenished.

G. Recommendation: Develop a set of incentives to promote the development of congregate senior housing projects.

Discussion: The Task Force recognizes that lack of assisted living, memory care, board-and-care and nursing home beds in Laguna cannot easily be remedied. The cost and scarcity of suitable building sites, as well as the challenging process of local development, make any new senior housing project a daunting, long-term undertaking. A large-scale assisted living project needs a minimum of 40-50 units to be economically viable. Even with 25 percent of those units set aside for low-to-moderate income residents, such a project would face strong resistance from segments of the community and could potentially prompt a referendum to move forward. Nevertheless, the City can promote efforts to develop congregate senior facilities that support the Housing Element by creating an incentive package that would reduce the local regulatory burdens including the waiving of fees and the expediting of permits.

Fiscal Impact: Loss of revenues from fees.

H. Recommendation: Actively market the “aging in place” programs and services that the City offers or supports.

Discussion: In order to educate Laguna Beach Seniors and others on the “aging in place” programs, it will be paramount that the program be prominent on the City’s web site, the LB Seniors web site and potentially other civic group web sites in addition to periodical parks and recreation publications that reach all citizens in Laguna Beach. Moreover, it will be important to initiate press releases to all media outlets when new “aging in place” programs are launched.

Fiscal Impact: Cost of developing and distributing brochures, placing ads, and other marketing activities.

I. Recommendation: The Senior Housing Task Force will reconvene in early 2017 to discuss the transit presentation to the Council as it concerns local bus and trolley services, and their impact on older residents’ ability to age-in-place.

Discussion: To be effective, “aging in place” housing policies and programs must prioritize transportation in order to keep older non-drivers connected to the community, and prevent the inactivity and depression associated with social isolation. Therefore, the Task Force recommends that it reconvene for one or two sessions to work with the City’s Transit and Parking Manager to assess recommendations from the City’s Transit Study, which is currently in development, to increase senior mobility, and recommend alternatives to the current City bus system (excluding the visitor-oriented trolleys), such as a multiyear demonstration project of a subsidized 24/7 on-demand, door-to-door transit.

Fiscal Impact: None for the Task Force.

J. Recommendation: Hold an annual aging-in-place workshop to educate homeowners about aging-in-place strategies.

Discussion: The attendance at the 2016 Improve Don’t Move Workshop suggests that follow-up workshops would benefit older homeowners.

Fiscal Impact: Minimal, cost of materials and marketing.

K. Recommendation: The Senior Task Force will reconvene in a year to assess the status of its recommendations.

In concluding its work with this report, the Task Force members would like to commend the outstanding work by our staff liaison, Belinda Deines, the continuing support of Greg Pfof and his diligent staff, and the guidance of our Council liaison Rob Zur Schmiede. Many of our accomplishments would not have been possible without their expertise and excellent assistance.

Respectfully,

Kristine Thalman, Chair

Committee Members: Gary Boisen, Marc Bruderer, Gail Duncan, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, Councilmember Robert Zur Schmiede, and Belinda Deines, Staff Liaison

Cc Greg Pfost, Dennis Bogle

Appendices

Senior Housing Task Force Final Report

Appendix A – Senior Housing Task Force Agendas and Minutes

Note: Due to the size of the agenda bill, Appendix A is available online linked to the agenda bill and a hard copy has been placed in the City Council office. If you would like a hard copy of this Appendix A, then please contact the City Clerk

Senior Housing Task Force Final Report

Appendix B – CSU Fullerton Survey - “Assessing the Housing Needs of Seniors in Laguna Beach: A Mail Survey”

Note: Due to the size of the agenda bill, Appendix B is available online linked to the agenda bill and a hard copy has been placed in the City Council office. If you would like a hard copy of this Appendix B, then please contact the City Clerk

Senior Housing Task Force Final Report

Appendix A – Senior Housing Task Force Agendas and Minutes

Note: Due to the size of the agenda bill, Appendix A is available online linked to the agenda bill and a hard copy has been placed in the City Council office. If you would like a hard copy of this Appendix A, then please contact the City Clerk

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Wednesday, June 18, 2014

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Public Communications
- 2) Staff/Committee Communications
 - Future Meeting Dates
 - Overview of Senior Housing
- 3) Discussion Item:
 - Identify goals and scope of work
- 4) Adjournment to the meeting of July 17, 2014 at 4:00 p.m.

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

cc: Director of Community Development
Planning Manager
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

June 18, 2014

1. Mayor Elizabeth Pearson, Anne Johnson, Chris Quilter, Danielle Wilson, Darcy Loveland, Gary Boisen, Kristine Thalman, Laura Storke, Marc Bruderer and staff liaison Belinda Deines were present.
2. Staff/Task Force Communications:
 - Future Meeting Dates: The Task Force agreed to set the recurring meeting date on the 3rd Wednesday of every month at 4:00 p.m. Mayor Pearson requested to reschedule the July meeting to Thursday, July 17 at 4:00 p.m. due to a conflict.
 - Overview of Senior Housing

Belinda Deines gave a brief summary of the City's senior housing and services as described in the 2013-2021 Housing Element. Program 36 establishes the Task Force's objectives to provide recommendations to the Planning Commission regarding:

 1. Senior citizen housing options (including but not limited to residential care homes [board and care homes], assisted living facilities and congregate care facilities);
 2. Housing-related services (including but not limited to "non-medical home assistance" and "home health care" that will enable Laguna Beach seniors to live independently in their homes with necessary services); and
 3. Evaluation the City's Reasonable Accommodation Ordinance to ensure it adequately addresses the access and mobility issues of seniors and persons with disabilities.
3. Discussion Item: Identify goals and scope of work

Mayor Pearson is aware of new interest among housing developers with experience managing successful senior housing facilities. Chris Quilter clarified that the Task Force should encourage a variety of housing types and care. Kristine Thalman, Anne Johnson and Marc Bruderer attended the Incircle Village Network by SeniorServ presentation at the last Laguna Beach Seniors board meeting. Danielle Wilson and Gary Boisen questioned whether a senior housing project would be easier to repurpose existing buildings or build new construction. Mayor Pearson expressed that it is most difficult to fundraise and garner public will for seniors; the balance of politics, neighbors and support will be a challenge, common to most development in Laguna Beach in general.

The Task Force has developed the following duties to update at the next meeting:

1. Compile list of local senior housing locations to visit; Task Force members to forward suggestions to Belinda Deines via email (Elizabeth Pearson, staff)
 2. Develop key terms/vocabulary list for various services and housing types (Kristine Thalman, Marc Bruderer)
 3. Form subcommittee for potential meeting with developer(s) (Anne Johnson, Chris Quilter)
 4. Research services provided by Susi Q Senior Center (Anne Johnson)
 5. Promote and learn more about Second Residential Unit Ordinance (Chris Quilter, staff)
 6. Explore virtual village concept with Laguna Beach Seniors (Kristine Thalman)
 7. Request potential architect/developer to attend Task Force meeting (Elizabeth Pearson)
4. The meeting was adjourned at 5:30 p.m. to the meeting of July 17, 2014 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Thursday, July 17, 2014
Community and Senior Center – Laguna Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Public Communications
- 2) Staff/Task Force Communications
 - Appoint Task Force Chair and Vice-Chair
- 3) Discussion Items:
 - Guest Speaker: Lance Polster, Architect
 - Recap on meeting with Michael Beck at Mission Hospital Laguna
 - Review of Susi Q Senior Center services
 - Guest Speaker: John Fay, Susi Q Senior Center
 - Task Force update on scope of work and duties
- 4) Adjournment to the meeting of August 20, 2014 at 4:00 p.m.

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cc: Director of Community Development
Planning Manager
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

August 27, 2014

1. Mayor Elizabeth Pearson, Anne Johnson, Danielle Wilson, Darcy Loveland, Kristine Thalman, Laura Storke, Marc Bruderer and staff liaison Belinda Deines were present. Chris Quilter and Gary Boisen were absent.
2. Discussion Items:
 - Guest Speaker: Lance Polster, Architect
Lance Polster introduced a conceptual plan to develop senior housing in South Laguna within the Institutional zone. The plan was considered prior to the recession and included independent and some assisted living units ranging from affordable to luxury as 62+ senior condominiums with ocean views. This project was only conceptual and needed to gain community support.
 - Recap on meeting with Michael Beck at Mission Hospital Laguna
Anne Johnson, Kristine Thalman and Chris Quilter met with Michael Beck to discuss whether Mission Hospital would move forward with the senior housing project. Anne explained that the hospital underwent needed maintenance leading to unexpected costs, which set the project aside and is no longer a priority.
 - Review of Susi Q Senior Center services: defer item to August meeting
 - Guest Speaker: John Fay, Susi Q Senior Center
John Fay gave the Task Force a detailed presentation on the Virtual Village concept, which is intended to assist aging in place without relocation. The concept builds a resource center to collaborate existing services for case management, non-medical personal care, respite care and other senior issues. Laguna Beach Seniors is looking at their three-year plan to would use Susi Q as a hub to reach out to people and encourage communication to launch the program.
3. The meeting was adjourned at 5:15 p.m. to the meeting of August 20, 2014 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Wednesday, August 27, 2014
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Public Communications
- 2) Staff/Task Force Communications
- 3) Discussion Items:
 - Review of Susi Q Senior Center services
 - Recap on Mission Hospital concept
 - Distribute senior housing and services key terms
 - Evaluate field trip location options
 - Primer on Housing Element and RHNA
- 4) Adjournment to the meeting of September 17, 2014 at 4:00 p.m.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

August 27, 2014

1. Gary Boisen, Marc Bruderer, Anne Johnson, Chris Quilter, Laura Storke, Kristine Thalman Danielle Wilson and staff liaison Belinda Deines were present. Elizabeth Pearson and Darcy Loveland were absent.
2. Discussion Items:
 - Review of Susi Q Senior Center services

Anne Johnson gave a presentation on senior services provided by Laguna Beach Seniors at the Susi Q Senior Center. She reported that LB Seniors has in-house staff to assist the public with senior care issues. Anne produced a handout with monthly statistics, types of services and facilities, clientele profile and current issues. The Task Force concluded that one of the recommendations to the Planning Commission would be for the City to collaborate with LB Seniors to support the launch of the Laguna Beach Virtual Village concept. As the Laguna Beach population continues to age with no existing senior assisted living or retirement communities, the proposed Village concept would allow residents to age in place by bringing a full net of supportive services to seniors in the community.
 - Recap on Mission Hospital concept

The Task Force discussed local challenges to potential development for senior housing projects. Chris Quilter pointed out that three senior housing projects were developed in Laguna Beach between 1984 and 1989. These projects were built with assistance from the City with zoning relief, financial assistance and monetary grants for development. Though all 111 units are currently affordable to seniors, no new senior or retirement developments have been constructed in recent years.
 - Distribute senior housing and services key terms

Kristine Thalman distributed a two-page list of definitions and terms for senior housing and health care options. The Task Force wanted to include these definitions to supplement the recommendations to the Planning Commission.
 - Evaluate field trip location options

The Task Force reviewed the list of suggested field trip locations and determined that most members have already visited these local facilities. The Task Force decided to defer any field trip to later on if necessary.
 - Primer on Housing Element and RHNA

Belinda Deines provided a summary handout of the 2013-2021 Housing Element that provides additional background information specific to senior housing existing conditions and policies. From now until 2021, Laguna Beach is projected to have an increase in population of 35-40 people and the City's Regional Housing Needs Allocation is a total of two units: one very-low income unit and one low-income unit. Nonetheless, the Housing Element identifies senior housing a high priority with consideration of the expected generation shift.
3. The meeting was adjourned at 5:15 p.m. to the meeting of September 17, 2014 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Wednesday, October 15, 2014
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Public Communications
- 2) Staff/Task Force Communications
- 3) Discussion Items:
 - Distribute key terms for senior housing and services
 - Review existing Reasonable Accommodation Ordinance
 - Evaluate potential senior housing/elder care ordinance
- 4) Adjournment to the meeting of November 19, 2014 at 4:00 p.m.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

October 15, 2014

1. Gary Boisen, Marc Bruderer, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman Danielle Wilson and staff liaison Belinda Deines were present. Elizabeth Pearson and Laura Storke were absent.
2. Staff/Task Force Communications
 - Memo from Senior Housing Task Force Chair
Chair Kristine Thalman prepared and distributed a memorandum summarizing work completed and tasks moving forward. The Task Force noted and discussed completed tasks and Anne Johnson noted that the Virtual Village initiative should be part of the upcoming budget and receive funding from a Community Assistance Grant. Kristine recommended forming a “brainstorming session” with senior housing developers to gather potential ideas for development in Laguna Beach. Danielle Wilson and Gary Boisen will research City-owned land and privately owned parcels that may be potential sites for multiple-unit senior housing facilities. The group also noted that the Task Force should continue its work through 2015, and will include the extension as a recommendation.
3. Discussion items:
 - Review existing Reasonable Accommodation Ordinance
The Task Force discussed that the existing ordinance is governed under State of California law and intended for persons with disabilities, and not necessarily for senior citizens specifically. It may be beneficial to notify residents that this ordinance provides flexibility for zoning and building code requirements. Chris Quilter suggested reaching out to local contractors to take an online certification course at www.homemodes.org for “age-in-place” home modification.
 - Evaluate potential senior housing/elder care ordinance
Belinda Deines proposed that the Task Force consider proposing a senior housing ordinance to include as a potential recommendation to the Planning Commission. Other Southern California cities have adopted similar ordinances that identify incentives and development standards specific to senior housing. Belinda will provide the Task Force with sample ordinances at the next meeting.
4. The meeting was adjourned at 5:20 p.m. to the meeting of November 12, 2014 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Wednesday, November 12, 2014

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Public Communications
- 2) Staff/Task Force Communications
- 3) Discussion Items:
 - Identify potential parcels for development
 - Review sample senior housing ordinances
 - Develop final recommendations to Planning Commission
- 4) Adjournment

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CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, January 26, 2015
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Introductions
 - Welcome Councilmember Rob Zur Schmiede
- 2) Public Communications
- 3) Staff/Task Force Communications
 - 2015 Task Force Calendar
- 4) Discussion Items:
 - Planning Commission Meeting Presentation Recap
 - Virtual Village Business Plan
- 5) Adjournment

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

January 26, 2015

1. Rob Zur Schmiede, Gary Boisen, Marc Bruderer, Anne Johnson, Darryl Loveland, Chris Quilter, Kristine Thalman and staff liaison Belinda Deines were present. Danielle Wilson and Laura Storke were absent.
2. Staff/Task Force Communications
 - 2015 Task Force Calendar
Belinda Deines distributed the calendar with dates and locations of Task Force meetings through December 2015.
3. Discussion items:
 - Planning Commission Meeting Presentation Recap
Chair Kristine Thalman gave an overview of the presentation given to the Planning Commission to affirm the Task Force's objectives moving forward. Rob Zur Schmiede offered to reach out to a contact for a list of low-income senior housing developers that could be invited to separate Task Force meetings. Kristine recommended to staff that it may be beneficial to have a Task Force member present when there is interest in developing senior housing in the near future. Anne Johnson commended the presentation, which had a positive, broader outcome to have the topic of seniors on the Planning Commission and community's radar for development in general. Rob suggested that the Task Force should give a similar presentation to the City Council as an update to show progress and justify funding to identify senior needs.
 - Virtual Village Business Plan
Kristine noted that the Virtual Village Steering Committee will convene to work with a survey company to develop specific questions to target senior needs. Anne will contact organizations, including CSU Fullerton, to find out more information about managing the Senior Housing Task Force community survey. Anne requested staff to generate a list of recommendations in a one-sheet bullet format. Chris Quilter suggested further developing a program through the City for aging-in-place home modification program. Belinda suggested that the City's Building Official, Dennis Bogle, should be invited to attend the next Task Force meeting to evaluate the potential for a program that incorporates contractors' certification, expedited review process and informational guides for seniors.
4. The meeting was adjourned at 5:20 p.m. to the meeting of February 23, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, February 23, 2015
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Introductions
- 2) Public Communications
- 3) Discussion Items:
 - Aging-in-place Home Modification Program - Dennis Bogle, Building Official
 - Contractors' certification, expedited review process and informational guides
 - Senior Housing Task Force Needs Assessment Survey
- 4) Staff/Task Force Communications
 - Task Force Five-Minute Report to City Council on Tuesday, March 17
- 5) 5) Adjournment to the meeting of March 23, 2015 at 4:00 p.m.

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CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, March 23, 2015

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Introductions
- 2) Public Communications
- 3) Discussion Items:
 - Aging-in-place Home Modification Program
 - Senior Needs Assessment Survey
 - Update on Virtual Village Steering Committee
 - Second Residential Unit Ordinance
- 4) Staff/Task Force Communications
- 5) Adjournment to the meeting of April 27, 2015 at 4:00 p.m.

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

March 23, 2015

1. Gary Boisen, Marc Bruderer, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, Danielle Wilson and staff liaison Belinda Deines were present. Rob Zur Schmiede and Laura Storke were absent.
2. Discussion items:
 - Aging-in-place Home Modification Program

Chris Quilter noted that there is a database of CAPs certified within 25 miles of Laguna Beach with 20-35 people. Building Industry Association of Southern California has a 55+ Housing Council that provides education and networking tools for building and serving the senior market. He suggested looking at www.biasc.org and www.homemods.org. The goal of the program would be a referral resource to contractors and certification, with also an opportunity for in-home assessment as a first step to create a point of contact. Anne Johnson suggested including a summary of City costs on the handout for the public, compiling a file for all information and creating a potential workshop for the program.
 - Senior Housing Task Force Needs Assessment Survey

Kristine Thalman gave a brief synopsis of the update to the City Council. Estimates from CSU Fullerton appear to be more than the allocation of \$10,000. The proposed phone survey would be \$15k and a mail survey would be \$12,800. This survey is designated as a City survey plus public outreach and the Task Force will be asking for \$5,000 more to make up the difference in costs. Staff will coordinate the contract between CSUF and the City of Laguna Beach. Gary Boisen noted that the Board of Realtors may give grants for focus groups in the future. Kristine requested for the Task Force to email their questions by March 31.
 - Update on Virtual Village Steering Committee

San Clemente Virtual Village is having a brainstorming session with stakeholders on March 26 from 11am to 12:30pm at the LDS church. Jeanine Edmond, Laguna Beach Seniors, generated a list of services teams to show how the Virtual Village would operate.
 - Second Residential Unit Ordinance

Belinda Deines gave a summary of the City's current second residential unit ordinance with reference to development standards and incentives.
3. Staff/Task Force Communications:

Anne Johnson reported on incentives for forbearance on property taxes and the program is postponed until new legislation takes effect in July 2016. The program benefits aged 62+, blind/disabled, income \$35k or less and with 40% equity each year.
4. The meeting was adjourned at 5:40 p.m. to the meeting of April 27, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, April 27, 2015

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Introductions
- 2) Public Communications
- 3) Discussion Items:
 - Guest Speakers: Pat Whitaker and Lisa Stipkovich
 - Senior Needs Assessment Survey
 - Update on Home Modifications Program
- 4) Staff/Task Force Communications
 - No meeting in May
- 5) Adjournment to the meeting of June 22, 2015 at 4:00 p.m.

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cc: Director of Community Development
Planning Manager
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

April 27, 2015

1. Gary Boisen, Marc Bruderer, Anne Johnson, Darcy Loveland, Laura Storke, Kristine Thalman, Danielle Wilson and staff liaison Belinda Deines were present. Rob Zur Schmiede and Chris Quilter were absent.

2. Discussion items:

- Guest Speaker: Lisa Stipcovich

Chair Kristine Thalman introduced Lisa Stipcovich, a consultant with years of planning, land use and redevelopment experience. Lisa worked for the City of Anaheim for 34 years and has been a resident of Laguna Beach for 43 years. Pat Whitaker was unable to attend. Lisa noted that any proposed project needs two things: (1) a site and (2) political will. In her career on behalf of the City of Anaheim's redevelopment efforts, she spent time buying land that can be available for potential use. She observed that Laguna Beach does not have dedicated resources and the Housing Authority of Orange County provides for the City's services. Lisa explained the various funding sources that developers utilize for affordable housing projects, especially with regard to tax credits. Anne Johnson noted that the Laguna Beach has a need for assisted living and continuum of care services for residents that do not want to leave the area. Lisa suggested evaluating the City's existing assets. She said that usually senior housing is the easiest to develop in terms of political will, but in Laguna Beach, everyone objects to any kind of development. The City may want to look at creating its own housing authority to keep funding locally and the Task Force should research the inventory of City-owned sites.

- Senior Needs Assessment Survey

Kristine said that she has made the request to the City Manager for the additional funding needed for the survey. Belinda Deines will coordinate with CSU Fullerton to finalize the contract and timeline.

- Update on Home Modification Program

Staff deferred item to May meeting so that the Building Official could provide an update.

3. Staff/Task Force Communications:

Anne reported that the subcommittee met with Michael Beck of Mission Hospital and representatives of the Sisters of St. Joseph. The subcommittee consists of Chris Quilter, Kristine Thalman and Anne Johnson. The meeting involved discussion about the need for assisted living and rehabilitation facilities. Anne noted that the talk was positive and the group discussed the ability for technology to reduce return visits to the hospital.

Belinda noted that there is no meeting scheduled for May due to the Memorial Day Holiday. The Task Force voted to reschedule the meeting to May 18, 2015.

4. The meeting was adjourned at 5:40 p.m. to the meeting of May 18, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, May 18, 2015

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Introductions
- 2) Public Communications
- 3) Discussion Items:
 - Home Modifications Program
 - Senior Needs Assessment Survey
 - GIS Presentation and Review of City-Owned Properties
- 4) Staff/Task Force Communications
- 5) Adjournment to the meeting of June 22, 2015 at 4:00 p.m.

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

May 18, 2015

1. Gary Boisen, Marc Bruderer, Anne Johnson, Laura Storke, Kristine Thalman and staff liaison Belinda Deines were present. Darryc Loveland, Chris Quilter and Danielle Wilson were absent.
2. Public Communications: Steve Glasser expressed valid concerns related to the constraints of senior housing and affordability. He explained that the waitlist for Section 8 through the County of Orange can be 5-6 years and HUD waitlists are even more difficult.
3. Discussion items:
 - Home Modifications Program
Staff deferred the item to June. Belinda Deines will follow up with the Building Official to further develop program materials.
 - Senior Needs Assessment Survey
Chair Thalman gave a brief update on the budget with the total request to City Council for \$15,000 to conduct the Needs Assessment Survey. The Budget Workshop will take place on Tuesday, May 19 and Kristine encouraged the Task Force members to express support for the additional funding request.
 - GIS Presentation and Review of City-Owned Properties
Belinda gave an overview of City-owned properties and conceptually discussed the potential for development of senior housing units. The Task Force requested a list of all the properties with the zone, lot size, building site status, existing uses, etc. to evaluate potential sites.
4. Staff/Task Force Communications:
Gary Boisen asked the Task Force to generate potential statistics that could be compiled from the MLS or resources from the Board of Realtors. He also noted that a representative from a title company may also be able to provide additional information to help evaluate the senior population's needs and resources specific to Laguna Beach. The Task Force brainstormed several key characteristics and data that would help inform the Task Force's final recommendations.
5. The meeting was adjourned at 5:30 p.m. to the meeting of June 22, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, June 22, 2015

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of May 18, 2015 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items:
 - Home Modifications Program
 - Additional Survey Data from MLS and Realtors
 - Update on Senior Needs Assessment Survey
 - Affordable Housing Developers
- 5) Staff/Task Force Member Reports
- 6) Adjournment to the meeting of July 27, 2015 in the Susi Q/Community Center Game Room at 4:00 p.m.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

June 22, 2015

1. Gary Boisen, Marc Bruderer, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman and staff liaison Belinda Deines were present. Danielle Wilson and Laura Storke were absent.
2. Discussion items:
 - Home Modifications Program
Dennis Bogle, City's Building Official, asked the Task Force for additional direction with the framework of the program. Anne Johnson suggested an Open for Construction workshop on aging-in-place home modifications to educate the public and gain specific input on the proposed program. The workshop would include a slideshow presentation by the Building Official and feature a reaction panel that consists of a local architect, a contractor/builder, a representative or case manager from Laguna Beach Seniors and (?). All members of the public will be encouraged to attend, especially the local development community and residents seeking to improve their homes. The Task Force may also reach out to the Chamber of Commerce, Laguna Friends of Architecture and other local groups that may be interested in this topic. The Task Force is considering hosting the event at the Susi Q/Community Center multi-purpose room on a weekend in October 2015.
 - Additional Survey Data from MLS and Realtors
Anne deferred the item to the next meeting.
 - Senior Needs Assessment Survey
Kristine Thalman informed the Task Force that CSU Fullerton will be sending the surveys the first week of July. City staff will send a notification letter to the select households receiving the survey in the mail. Chris Quilter noted that it will be very important to reach out to the local media and press so that there is a high response rate among those that receive the surveys. The Task Force felt that the language in the draft notification letter prepared by CSU Fullerton should be revised and that City staff contact information should be included. Anne offered to review the letter and send the revision to staff.
 - Affordable Housing Developers
Kristine suggested directing inquiries from affordable housing developers to City staff. Belinda noted that she is available to meet with developers to discuss potential housing opportunities.
3. The meeting was adjourned at 5:30 p.m. to the meeting of July 24, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, July 27, 2015
Community and Senior Center – Game Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of June 22, 2015 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Guest Speaker: Jeff McEachern, Aging in Place Advisors
- 5) Discussion Items:
 - Home Modifications Workshop in October
 - Senior Needs Assessment Survey
 - Additional Survey Data from MLS and Realtors
- 6) Staff/Task Force Member Reports
- 7) Adjournment to the meeting of August 24, 2015 in the Susi Q/Community Center Game Room at 4:00 p.m.

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Assistant Director of Community Development
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

July 27, 2015

1. Marc Bruderer, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, Danielle Wilson and staff liaison Belinda Deines were present. Gary Boisen was absent.
2. The Minutes of June 22, 2015 were approved as amended.
3. Guest Speaker: Jeff McEachern from Aging in Place Advisors gave a presentation on their company's mission to advise seniors, families and caregivers on technology solutions that facilitates aging in place and provides ongoing support. The company provides senior care technologies and consists of certified aging in place specialists (CAPS). The technology programs offered provide social solutions, home health/vitals/ADL monitoring, activity monitoring, PERS and medication management/dispensers.
4. Discussion items:
 - Home Modifications Workshop in October
The Task Force appointed Anne Johnson and Marc Bruderer to the Home Modifications Workshop subcommittee. The workshop will be scheduled for a Saturday in October, from 1-4 PM. Anne will coordinate the panel of speakers for the workshop, and suggested there should be handouts and visuals on a tabletop with resources. Belinda will check remaining funds in the Task Force budget for light refreshments and advertisements. The subcommittee will follow up with City staff to further coordinate logistics for the workshop.
 - Senior Needs Assessment Survey
Kristine, Chris, Anne and Belinda noted that community members have contacted them with inquiries regarding the survey and senior needs. Belinda reported that CSU Fullerton has received a higher survey response rate than anticipated so far. The Task Force unanimously voted to extend the survey mail-in date to August 10, rather than July 30. Chris said Laguna Beach Seniors will publish an article about the survey in their newsletter, which may generate more responses.
 - Additional Survey Data from MLS and Realtors
Anne deferred the item to the next meeting.
5. Staff/Task Force Member Reports
Belinda noted that Laura Storke is no longer on the Housing and Human Services Committee and therefore no longer on the Task Force. The Committee will appoint a new representative to the Senior Housing Task Force at their next meeting on August 5. The Task Force voted unanimously to reschedule the next Senior Housing Task Force meeting from August 24 to Monday, August 31.
6. The meeting was adjourned at 5:05 p.m. to the meeting of August 31, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, August 31, 2015

Community and Senior Center – Game Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Welcome New Member: Jane Fulton
- 3) Approval of July 27, 2015 Minutes
- 4) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 5) Discussion Items:
 - “Don’t Move, Improve!” - Home Modifications Workshop: Saturday, October 17
 - Senior Housing Needs Assessment Survey – Update from CSU Fullerton
 - Additional Survey Data from MLS and Realtors
- 6) Staff/Task Force Member Reports
- 7) Adjournment to the meeting of September 21, 2015 in the Susi Q/Community Center Game Room at 4:00 p.m.

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Assistant Director of Community Development
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

August 31, 2015

1. Gary Boisen, Marc Bruderer, Jane Fulton, Anne Johnson, Darrey Loveland, Chris Quilter, Kristine Thalman, Danielle Wilson and staff liaison Belinda Deines were present.
2. The Minutes of July 27, 2015 were approved as presented.
3. Discussion items:
 - “Don’t Move, Improve!” Home Modifications Workshop on Saturday, October 17
Anne Johnson, Dennis Bogle and Belinda Deines met to discuss workshop logistics and format. Anne also notified Councilmember Zur Schmiede and the City Manager of the proposed workshop. Anne and Marc are working on a tentative schedule for marketing the program creating a news advertisement schedule, targeting interest groups and forwarding information to community newsletters. Other resources include the City’s website, email lists, Facebook, Nextdoor and a flyer/post card. The workshop will include a speaker panel of four experts: Morris Skenderian, Dennis Bogle, Ben Morey and Peter McCarroll. Each speaker will give an 8-10 minute presentation with cross talk, with an opportunity for questions to follow. Chair Thalman will moderate the panel after an introduction by Anne Johnson.
 - Senior Needs Assessment Survey – Update from CSU Fullerton
Because the survey mail-in date was extended to August 10th, the report deadline has been approved by City staff with a modified deliverable date. The report will be completed by mid-September and presented at the next Task Force meeting. Belinda will contact CSU Fullerton staff to see if Laura Gil-Trejo will be available to attend the next meeting.
 - Additional Survey Data from MLS and Realtors
The Task Force deferred the item to after the final report of the Senior Needs Assessment Survey is completed and reviewed by the Task Force.
4. Staff/Task Force Member Reports
Belinda will forward a list of Task Force members with updated contact information.
5. The meeting was adjourned at 5:05 p.m. to the meeting of September 22, 2015 at 11:00 a.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Tuesday, September 22, 2015

Community and Senior Center – Laguna Room
380 Third Street
Laguna Beach, CA 92651

11:00 A.M.

AGENDA

- 1) Call to Order
- 2) Approval of August 31, 2015 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items:
 - “Don’t Move, Improve!” - Home Modifications Workshop: Saturday, October 17
 - Senior Housing Needs Assessment Survey – Update from CSU Fullerton
- 5) Staff/Task Force Member Reports
- 6) Adjournment to the meeting of October 26, 2015 in the Susi Q/Community Center Game Room at 4:00 p.m.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

September 22, 2015

1. Gary Boisen, Jane Fulton, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, Danielle Wilson, staff liaison Belinda Deines and were present. Marc Bruderer was absent.
2. The Minutes of August 31, 2015 were approved as revised.
3. Discussion items:
 - “Don’t Move, Improve!” Home Modifications Workshop on Saturday, October 17
Anne Johnson distributed drafts of the flyer and press releases for review. Kristine Thalman will follow up with the panelists to obtain photos and biographies, ask for handouts and presentations, and finalize the workshop program outline. Anne will work with staff to generate the flyer and postcards that the Task Force members can help distribute through email contacts. The program will take place on Saturday, October 17, 1:30-3:30 p.m. in the Community/Susi Q Center Multi-Purpose Room. Room setup will begin around 12:30 p.m. and Task Force members were encouraged to attend early to help.
 - Senior Needs Assessment Survey – Update from CSU Fullerton
Laura Gil-Trejo, CSU Fullerton, summarized the results of the survey to the Task Force. The survey was still in draft form and she pointed out key responses and trends based on the sample received. The Task Force asked for additional time to review the draft and for Laura to prepare an executive summary that gives an overview of the results. Task Force members will have until October 2nd to email any suggested revisions directly to Laura. The Task Force requested that the final survey results be presented to the City Council at either the last meeting in October or first meeting in November. Staff will prepare an agenda bill for City Council once the final survey report is complete. The Task Force asked Laura to attend the City Council meeting to address any questions the Council may have regarding the final report.
4. Staff/Task Force Member Reports
5. The meeting was adjourned at 5:05 p.m. to the meeting of October 26, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, October 26, 2015

Community and Senior Center – Game Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of September 22, 2015 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items:
 - Recap on Home Modifications Workshop
 - Needs Assessment Survey: November 3, 2015 City Council Meeting
 - Final Task Force Recommendations
- 5) Staff/Task Force Member Reports
- 6) Adjournment to the meeting of November 23, 2015 in the Susi Q/Community Center Game Room at 4:00 p.m.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

October 26, 2015

1. Councilmember Rob Zur Schmiede, Marc Bruderer Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, Danielle Wilson, staff liaison Belinda Deines and were present. Gary Boisen and Jane Fulton were absent.
2. The Minutes of August 31, 2015 were approved as revised.
3. Bryce Alderton, Coastline Pilot, was in attendance to find out information from the workshop and the survey results.
4. Discussion items:
 - Recap on Home Modifications Workshop
Chair Kristine Thalman thanked Councilmember Rob Zur Schmiede and Anne Johnson for presenting at the workshop. Anne provided the attached report with the workshop feedback and 41 people attended, not including the panelists, staff and Task Force members. She noted that the workshop was well-received for getting through the myth of the development process, the need for good handouts and information on the website, and the desire to develop a list of resources. The workshop resulted in interest gained for involvement with the Virtual Village Steering Committee. Chris Quilter expressed concern with low- to middle-income Laguna Beach residents that may have difficulty obtaining appropriate permits; however, he said Dennis Bogle brought up the important public safety issues. Rob said that there is a need to have in-person interaction with a representative for this demographic, but someone from the City would not do house calls for a safety evaluation. Darcy Loveland suggested a one-page summary of regulations for typical improvements.
 - Senior Needs Assessment Survey: November 3, 2015 City Council Meeting
The City Council will receive a status report of the survey results at the next City Council meeting. The Task Force recommended visuals and graphics for the presentation, highlighting the main 8-10 points gained from the survey results. The main points were related to years lived in Laguna Beach, map of respondents, willingness to pay for Virtual Village, fee for service vs. annual membership, and transportation options. Staff will work with CSU Fullerton staff to put together a slide presentation.
 - Final Task Force Recommendations
Kristine noted the following recommendations:
 - Dedication of one person on staff
 - Aging-in-place (reduce fees with qualification, modify regulations, expedite processing)
 - Advocacy to look at incentives to keep seniors in their homes
 - Continue Task Force another year for further development and implementation
 - Continue to explore assisted living options
5. Staff/Task Force Member Reports
6. The meeting was adjourned at 5:15 p.m. to the meeting of November 23, 2015 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, November 23, 2015

Community and Senior Center – Game Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of October 22, 2015 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items:
 - Task Force Recommendations to City Council on Tuesday, January 26, 2016
- 5) Staff/Task Force Member Reports
- 6) Adjournment to the meeting of December 28, 2015 in the Susi Q/Community Center Game Room at 4:00 p.m.

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Assistant Director of Community Development
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

November 23, 2015

1. Councilmember Rob Zur Schmiede, Gary Boisen, Marc Bruderer, Jane Fulton, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, Danielle Wilson, and staff liaison Belinda Deines were present.

2. The Minutes of October 26, 2015 were approved as presented.

3. Discussion items:

- Task Force Recommendations to City Council on Tuesday, January 26, 2016

Chair Kristine Thalman provided a recap of the survey results on November 3 to City Council. She noted that the work is not done, but the Task Force has accomplished great progress. One of the recommendations will be to extend the Task Force for another year. The Task Force is in favor of extending the work through 2016. Anne Johnson said that the Task Force should present by October 2016 to City Council and transition the work to the Virtual Village Steering Committee for the remainder of the year.

The Task Force discussed the following recommendations:

- Have City Council endorse “aging-in-place” initiatives
- Coordinate with City staff for transportation as a priority for the services provided
- Hire a dedicated staff person for Lifelong Laguna; funding specifically for part-time coordinator to oversee Virtual Village
- Propose changes in regulations for modifications to residential homes; simplify, streamline building permit process and designate one person to be accountable at the front counter (during specific hours)
- Continue to pursue assisted living locations and programs for options

Kris and Anne noted that they will prepare a draft staff report by the next meeting on Monday, January 11. Belinda Deines will prepare the Agenda Bill for the Tuesday, January 26, 2016 City Council Meeting. The item will be on the regular agenda.

4. Staff/Task Force Member Reports

Due to the holiday schedule, the Task Force voted to reschedule the December meeting to Monday, January 11, 2016 at 5:00 PM.

5. The meeting was adjourned at 5:15 p.m. to the meeting of January 11, 2016 at 5:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, January 11, 2016
Community and Senior Center – Laguna Room
380 Third Street
Laguna Beach, CA 92651

5:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of November 23, 2015 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items:
 - Task Force Recommendations to City Council on Tuesday, January 26, 2016
- 5) Staff/Task Force Member Reports
- 6) Adjournment

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Assistant Director of Community Development
City Clerk

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, February 22, 2016

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 3) Discussion Items:
 - Recap on City Council Meeting and 2016 Objectives
 - Subcommittees on Special Projects
- 4) Staff/Task Force Member Reports
- 5) Adjournment to Monday, March 28, 2016 at 4:00 P.M.

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

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MINUTES

SENIOR HOUSING TASK FORCE MEETING

February 22, 2015

1. Gary Boisen, Gail Duncan, Anne Johnson, Darryc Loveland, Chris Quilter, Kristine Thalman, and staff liaison Belinda Deines were present. Marc Bruderer and Jane Fulton were absent.
2. Discussion items:
 - Recap on City Council Meeting and 2016 Objectives

Vice Chair Chris Quilter noted that there were accolades from the City Council for the Task Force's accomplishments thus far. Anne Johnson noted that there should have been a more in depth presentation from staff and the Task Force to educate the public of the progress and status. Darryc Loveland asked if the Senior Housing Task Force would make the funding request to the City to fund a part time coordinator at Laguna Beach Seniors, as had been recommended by the Task Force, with this recommendation adopted by the City Council at their January 4, 2016 meeting. The Task Force discussed this and suggested that Laguna Beach Seniors make this request with the endorsement of the Task Force. Darryc and Chris Quilter noted this would need to be discussed further with Laguna Beach Seniors. Kristine Thalman noted that the Virtual Village Steering Committee will meet tentatively on April 21. Chris Quilter said that Laguna Beach Seniors has budgeted for Virtual Village planning in the first year and intend to fundraise from the City and other nonprofits. Anne and Kristine recommended meeting with Mission Hospital to ask if they are willing to develop. Gail Duncan noted that the Housing and Human Services Committee formed a subcommittee to research preservation strategies for the 15-unit senior rental units at Harbor Cove that has an affordability covenant to expire in 2019. Chris recommended inviting a social worker from Laguna Beach Seniors to the next meeting.
 - Subcommittees on Special Projects

The Task Force has assigned separate subcommittees to work on specific topics that align with the 2016 Objectives:

 1. Board and Care/Shared Housing: Chris Quilter and Darryc Loveland
 2. Maintaining Existing Senior Housing: Gail Duncan (HHS Subcommittee on Preservation of At-Risk Units)
 3. Aging-in-Place Home Modifications Program/City Ombudsman: Anne Johnson, Gary Boisen and Darryc Loveland
 4. Assisted Living: Anne Johnson and Kristine Thalman
3. Staff/Task Force Member Reports

The Task Force asked that the Housing and Human Services Committee appoint two representatives at their next meeting. It is important that all Task Force members are active and continue to complete assignments prior to the October 2016 deadline.
4. The meeting was adjourned at 5:15 p.m. to the meeting of January 11, 2016 at 5:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, March 28, 2016

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of February 22, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items:
 - Housing Case Management: Martha Hernandez, Laguna Beach Seniors
 - Updates on Subcommittees
 - Maintaining Existing Senior Housing (Gail)
 - Assisted Living (Kris/Anne)
 - Lifelong Laguna Virtual Village (Chris/Darrcy)
 - Aging-in-Place Home Modifications Program/City Ombudsman: Greg Pfost, Dennis Bogle and Belinda Deines
- 5) Staff/Task Force Member Reports
- 6) Adjournment to Monday, April 25, 2016 at 4:00 P.M.

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

cc: Director of Community Development
Assistant Director of Community Development
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

March 28, 2015

1. Gary Boisen, Marc Bruderer, Jane Fulton, Anne Johnson, Darcy Loveland, Chris Quilter, George Weiss and staff liaison Belinda Deines were present. Kristine Thalman was absent.
2. Public Communications: Verna Rollinger and Trudy Grossman attended to find out more information about proposed senior housing programs and aging-in-place home modifications.
3. Discussion items:
 - Housing Case Management
Martha Hernandez is a case manager for Laguna Beach Seniors and she led the group discussion specific to the housing issues that seniors experience locally. Some of her duties are based on calls and demand with referral to resources, specifically for homeless and seniors losing housing. Case managers gather information on income, refer individuals to the Alternative Sleeping Location, or offer alternative programs offered by the County of Orange. Martha discussed the liability and eviction process associated with shared housing, and explained that it is usually \$500-600 for a room but closer to \$800 in Laguna Beach. The County Housing Authority offers an affordable housing list, but people want to stay in Laguna Beach because of the support system. She noted the issues related to Section 8 vouchers, especially landlords raising rates despite the voucher limitations. There are also programs available for veterans and mentally ill. Anne Johnson asked if there is any data available, and Martha said she would be able to pull up monthly reports for the year. Jane Fulton said that increased market rates are affecting local seniors and that 60 days is not enough notice for eviction, recommending a possible ordinance for eviction control.
 - Aging-in-Place Home Modifications Program/City Ombudsman
Greg Pfof, Director of Community Development, explained that he met with Anne Johnson and Belinda Deines to discuss the duties of the ombudsman at City Hall. Belinda will be working with Dennis Bogle to further develop the program framework before launching after October 2016. Greg noted that additional training may be offered to all staff, especially with the anticipated demographic shift. Anne Johnson said the position would involve two hours per week, taking calls on a direct line, possible site visits, user friendly and the focus would be on aging-in-place improvements.
 - Subcommittees on Special Projects
Defer items to next meeting
4. Staff/Task Force Member Reports
5. The meeting was adjourned at 5:15 p.m. to the meeting of April 25, 2016 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, April 25, 2016
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of March 28, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items:
 - Updates on Subcommittees
 - Lifelong Laguna Virtual Village
 - Home Modifications Program
 - Maintaining Existing Senior Housing
- 5) Staff/Task Force Member Reports
- 6) Adjournment to Monday, May 23, 2016 at 4:00 P.M.

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

cc: Director of Community Development
Assistant Director of Community Development
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

April 25, 2016

1. Gary Boisen, Marc Bruderer, Jane Fulton, Anne Johnson, Darrey Loveland, Chris Quilter, Kristine Thalman, George Weiss and staff liaison Belinda Deines were present.
2. Public Communications: Leah Vasquez shared that she knows neighbors with needs and asked if the Task Force is looking into giving relief for home upgrades and referral to Laguna Beach Seniors case managers.
3. Discussion items:
 - Assisted Living
Kristine Thalman noted that the subcommittee met with Michael Beck of Mission Hospital two years ago and had a follow-up meeting with St. Joseph's staff. Mission Hospital is interested in the technology of Lifelong Laguna Virtual Village. Chris Quilter noted that there may be a new merger for Mission Hospital and transitional care is 15-20 miles away. The Task Force asked why Mission Hospital does not have capacity for transitional care, or whether we need a better transportation system.
 - Aging-in-Place Home Modifications Program/City Ombudsman
Anne Johnson reported that the program is intended to bypass the usual red tape and financial constraints. It is the role of the ombudsman to focus on issues, not open up complaints on illegal construction. There will be flyers and handouts, and the ombudsman may make home visits if necessary. Jane Fulton asked if there would be a grant program available for small improvements. Leah asked if it is possible to use the home in a modified way with caretaker units.
 - Lifelong Laguna
Kristine noted that the steering committee will be meeting monthly and the committee consists of individuals with broad expertise. Gary Boisen noted that the National Board of Realtors offer grants for education/awareness programs and that Lifelong Laguna would qualify.
4. Staff/Task Force Member Reports
Kristine recommended inviting housing developers such as Jamboree Housing and Mercy Housing to the next Task Force meeting. Anne noted that the Task Force should host a public workshop on isolated seniors.
5. The meeting was adjourned at 5:20 p.m. to the meeting of May 23, 2016 at 4:00 p.m.

CITY OF LAGUNA BEACH

**JOINT SENIOR HOUSING TASK FORCE AND
HOUSING AND HUMAN SERVICES COMMITTEE MEETING**

Monday, May 23, 2016

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order – Kristine Thalman, Senior Housing Task Force Chair
- 2) Introductions
- 3) Approval of April 25, 2016 Minutes
- 4) Public Communications – In order to assist the Senior Housing Task Force and Housing and Human Services Committee in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 5) Guest Speakers:
Opportunities and Constraints for Senior Housing Development in Laguna Beach
 - Welton Smith, Senior Vice President, Jamboree Housing
 - William Witte, Chairman and CEO, Related California
- 6) Staff/Task Force Member Reports
- 7) Adjournment to Monday, June 27, 2016 at 4:00 P.M.

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

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Assistant Director of Community Development
City Clerk

MINUTES

JOINT SENIOR HOUSING TASK FORCE AND HOUSING AND HUMAN SERVICES COMMITTEE MEETING

May 23, 2016

1. Gary Boisen, Marc Bruderer, Gail Duncan, Jane Fulton, Anne Johnson, Darrcy Loveland, Chris Quilter, Jheri St. James, Kristine Thalman, George Weiss and staff liaison Belinda Deines were present.
2. Public Communications: Ann Richardson, Kimberly Norton and Wayne (?) attended to listen and learn about affordable housing opportunities.
3. Guest Speakers:
 - Welton Smith, Jamboree Housing

Welton explained the current environment for affordable housing, especially with the huge change in the past five years with the dissolution of redevelopment. Redevelopment funding in California was used to provide high quality housing for (1) working families/working poor, (2) seniors (62+ for tax breaks), and (3) special needs (including chronically homeless, youth, disabled). In 2011, there was a huge vacancy of gap financing for affordable housing. With regard to Low-Income Housing Tax Credits, private investors could get involved in the development of affordable rental housing for low-income households. In Orange County, land is the most valuable commodity and biggest constraint because of the value (approximately 1 acre = \$4 million). There is a massive disparity between affordable and market rate units in Orange County, especially when the area is considered jobs rich. Seniors currently living in Jamboree Housing have a desire for aging-in-place in their communities. However, there is a challenge in financing assisted living facilities in this environment because of the service component. Tax credit financing cannot be used, and HUD programs like Section 202 is on life support, and 221 D3 and D4 are HUD backed financing programs ideal for housing vouchers for care of seniors. There have been corporate sponsorships for developmentally disabled facilities with grants and setup as 501c3 organizations. From a regulatory perspective, this is not easy to accomplish but can provide level of assistance using tax credit programs. For any public resource, fair housing dictates the renters and cannot discriminate groups. There can be methods to target residents, manage waitlists and preference points for live/work. Veterans housing is a big deal right now, and the most controversial is housing for families. Public housing is not like 50 years ago because the design is smaller, high quality and provides services. Every project will run into lack of political will. It depends on City Councils and the need to recognize if they are willing to move forward. In urbanized areas, it is beneficial to look at small sites and rehabilitate with adaptive reuse. The City needs to find a location and identify funding to look at what resources the City can bring. Because of the scarcity of land and money, there is a need to get creative with affordable housing.
 - Bill Witte, Related California

Alice Court is an apartment community located at 450 Glenneyre and was built by Jamboree Housing in 2004 as a joint venture partnership with Related Companies. Bill explained that the site was bought by the City with in-lieu funding received from the developers of the Montage Resort. The biggest obstacle in Laguna Beach is political will

because there is more sensitivity to affordable housing. The community will always find fault in density and parking, but Alice Court has not received one complaint in the past decade. The City Council needs to overcome the challenges and champion the project because affordable housing should either be a priority or it isn't. Assisted living provides challenges because there is the real estate component and the operations side of providing care and services. It becomes a financing issue and not currently in the assisted living business.

4. The meeting was adjourned at 5:30 p.m. to the meeting of June 27, 2016 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, June 27, 2016
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of May 23, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items: Updates from Subcommittees on Special Projects
 - Lifelong Laguna Virtual Village (Kristine/Chris)
 - Board and Care/Shared Housing (Chris/Darrcy)
 - Assisted Living (Kristine/Anne)
 - Maintaining Existing Senior Housing (Gail/Jane)
 - Aging-in- Place Home Modifications Program/City Ombudsman (Anne/Gary/Darrcy)
- 5) Staff/Task Force Member Reports
- 6) Adjournment to Monday, July 25, 2016 at 4:00 P.M.

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Assistant Director of Community Development
City Clerk

MINUTES

JOINT SENIOR HOUSING TASK FORCE AND HOUSING AND HUMAN SERVICES COMMITTEE MEETING

June 27, 2016

1. Gary Boisen, Jane Fulton, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, and staff liaison Belinda Deines were present. Marc Bruderer, Gail Duncan, and Jheri St. James were absent.
2. Discussion:
 - Lifelong Laguna Virtual Village
Kristine Thalman noted there was a meeting in July for the steering committee. Work groups were assigned for the committee for the business and marketing plans. The Committee needs to be clear about what services to provide and it will be a dynamic situation once the program is launched.
 - Board and Care/Shared Housing
Chris Quilter said that there are 681 board and care facilities in Orange County that are non-medical and must be licensed with the state. They are licensed by the State of California as a residential care facility operating as a group home in a residential setting (maximum six beds). Cost of land is prohibitive, and units are generally \$3-5k per month. Chris mentioned the concept of the green house movement, which is 30% more expensive, but may be more accepting. As a recommendation to Council, the Task Force should note that these types of housing are missing from our City, especially because there are no regulatory incentives. The Task Force discussed repurposing properties, especially with regard to outreach of large congregations and facilities like churches. Other ideas include Act V, Pavilions, behind Mission Hospital and other creative ideas.
 - Aging-in-Place Home Modifications Program
Anne Johnson said that the program should be turned over to the Lifelong Laguna partnership once the Task Force ends. The program would include a dedicated City staff person available two hours a week, possibly site visits and one dedicated phone line. The Lifelong Laguna subcommittee on this program includes Allison King, John Thomas and Anne Johnson. Belinda Deines will be the staff person. Anne also noted that there are specific programs in the Housing Element that the City should be pursuing. Gary Boisen said that seniors should be paying attention to the proposed historic ordinance because they may be affected by the proposed process, especially with regard to modifications to homes.
3. The meeting was adjourned at 5:20 p.m. to the meeting of July 25, 2016 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, July 25, 2016

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of June 27, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items: Updates from Subcommittees on Special Projects
 - Lifelong Laguna Virtual Village (Kristine/Chris)
 - Board and Care/Shared Housing (Chris/Darrey)
 - Assisted Living (Kristine/Anne)
 - Maintaining Existing Senior Housing (Gail/Jane)
 - Aging-in- Place Home Modifications Program/City Ombudsman (Anne/Gary/Darrey)
- 5) Staff/Task Force Member Reports
- 6) Adjournment to Monday, August 22, 2016 at 4:00 P.M.

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City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

July 25, 2016

1. Gary Boisen, Jane Fulton, Anne Johnson, Darcy Loveland, Chris Quilter, Kristine Thalman, and staff liaison Belinda Deines were present. Gail Duncan was absent.
2. Discussion:
 - Lifelong Laguna
Kristine Thalman said that the steering committee will produce their business plan by November and at the latest by the end of the year. Chris Quilter said that the committee is exploring other areas, and there is a good consensus to focus on the most vulnerable at risk of losing their homes. The committee intends to establish Lifelong Laguna as a “community cause” that fits in with potential grant funding and sponsorships to launch the program. The program will involve coordination with Mission Hospital. They agreed the program will no longer be referred as “virtual village” and rather “Lifelong Laguna at The Susi Q.”
 - Assisted Living
Kristine noted that the subcommittee will be meeting in August with Mission Hospital, and the subcommittee members will discuss prior to strategize priorities.
 - Maintaining Existing Senior Housing
Staff received a response letter from the City Attorney’s office regarding questions raised by the Preservation of At-Risk Units subcommittee for the Harbor Cove property. The subcommittee will meet with the City Attorney to discuss procedures moving forward. Chris noted that Ann Christoph had a column article about Vista Aliso. Belinda will follow up with a status on ownership.
 - Aging-in-Place Home Modifications Program
Anne Johnson noted that launching the Aging-in-Place program should take place once the Task Force is completed with a memorandum of understanding from participants such as the City and Laguna Beach Seniors.
3. Staff/Task Force Member Reports
Chris said that the Task Force needs to address transportation as a priority recommendation. There should be a City subcommittee to focus on this topic, and should get input from the Director of Public Works. Anne recommended receiving an update on the Public Transit survey from Public Works. Belinda will follow up with a November City Council date for recommendations.
4. The meeting was adjourned at 5:15 p.m. to the meeting of August 22, 2016 at 4:00 p.m.

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, August 22, 2016
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of July 25, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Guest Speaker: Mark Hoover, ActivCare Living – Presentation on memory care industry and development of specialized senior living communities
- 5) Discussion Items: Updates from Subcommittees on Special Projects
 - Lifelong Laguna Virtual Village (Kristine/Chris)
 - Board and Care/Shared Housing (Chris/Darrcy)
 - Assisted Living (Kristine/Anne)
 - Maintaining Existing Senior Housing (Gail/Jane)
 - Aging-in- Place Home Modifications Program/City Ombudsman (Anne/Gary/Darrcy)
- 6) Staff/Task Force Member Reports
- 7) Adjournment to Monday, September 26, 2016 at 4:00 P.M.

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Assistant Director of Community Development
City Clerk

MINUTES

SENIOR HOUSING TASK FORCE MEETING

August 22, 2016

1. Councilmember Rob Zur Schmiede, Gary Boisen, Marc Bruderer, Gail Duncan, Jane Fulton, Anne Johnson, Darrey Loveland, Chris Quilter, Kristine Thalman, and staff liaison Belinda Deines were present.
2. Public Communications: Dr. Korey Jorgenson from the Laguna Beach Community Clinic and Nadia Babayi from Laguna Beach Seniors were in attendance.
3. Guest Speaker: Mark Hoover and Kevin Moriarty, ActivCare – presentation on memory care industry and development of specialized senior living communities

ActivCare is a residential senior living provider that specializes in memory care. They are looking to expand locations into Orange County, with their facilities that focus on people with Alzheimer's and dementia. These facilities are smaller, with approximately 60 units on 1-1.5 acre sites and are less institutional and more residential in appearance. Kristine Thalman asked if they had specifically researched sites in Laguna Beach. They explained that it is a rare commodity to find at least a one acre site to build a 25,000 SF one-story structure. Kevin explained that none of their existing communities is in the coastal zone, and would not attempt a zone change from a developer's standpoint. Senior living communities have relationships with nonprofits, but do not partner because the financing is different. As a checklist, it is important to have a site that is flat, big enough, close to appropriate zoning, population analysis of demographic, proximity of adult children, and economic affordability. ActivCare rates are from private pay, not insurance. Chris Quilter asked if Laguna Beach was too small for the demand, but they have not done the demographic research and there is a possibility of adjusting to 50 beds.

4. Discussion:
 - Lifelong Laguna
Kristine said that the steering committee is meeting on Thursday to produce the business plan for launching. They are working with the Realtors for the launch event grant, and will have table tops as a Senior Housing Summit.
 - Assisted Living
Anne Johnson and Kristine met with Michael Beck to discuss potential development.
 - Aging-in-Place Home Modifications Program
Staff will meet with Anne and the subcommittee from the Lifelong Laguna Steering Committee to discuss marketing materials and program overview.
5. Staff/Task Force Member Reports
Belinda Deines noted that the Senior Housing Task Force final report is scheduled for City Council on Tuesday, November 15th.
6. The meeting was adjourned at 5:20 p.m. to the meeting of September 26, 2016 at 4:00 p.m.

CITY OF LAGUNA BEACH

SENIOR HOUSING TASK FORCE

Monday, September 26, 2016

Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of August 22, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items: Updates from Subcommittees on Special Projects
 - Lifelong Laguna Virtual Village (Kristine/Chris)
 - Board and Care/Shared Housing (Chris/Darrcy)
 - Assisted Living (Kristine/Anne)
 - Maintaining Existing Senior Housing (Gail/Jane)
 - Aging-in- Place Home Modifications Program/City Ombudsman (Anne/Gary/Darrcy)
- 5) Staff/Task Force Member Reports
 - Task Force Final Report to City Council scheduled for Tuesday, November 15
- 6) Adjournment to Monday, October 24, 2016 at 4:00 P.M.

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cc: Director of Community Development
City Clerk

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, October 3, 2016
Community and Senior Center – Community Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of August 22, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Items: Final Report Preparation
 - Lifelong Laguna (Kristine/Chris)
 - Board and Care/Shared Housing (Chris/Darrcy)
 - Assisted Living (Kristine/Anne)
 - Maintaining Existing Senior Housing (Gail/Jane)
 - Aging-in- Place Home Modifications Program/City Ombudsman (Anne/Gary/Darrcy)
- 5) Staff/Task Force Member Reports
 - Task Force Final Report to City Council scheduled for Tuesday, November 15
- 6) Adjournment to Monday, October 24, 2016 at 4:00 P.M.

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City Clerk

CITY OF LAGUNA BEACH
SENIOR HOUSING TASK FORCE

Monday, October 24, 2016
Community and Senior Center – Laguna Room
380 Third Street
Laguna Beach, CA 92651

4:00 P.M.

AGENDA

- 1) Call to Order
- 2) Approval of October 3, 2016 Minutes
- 3) Public Communications – In order to assist the Senior Housing Task Force in the timely completion of its business, speakers are asked to limit their presentations to three minutes or less. The Chairperson may extend this time for good cause. Names and, if given, addresses of speakers will be part of the official records.
- 4) Discussion Item:
 - Recommendation for Senior Transportation Task Force
 - Final Report to City Council on Tuesday, November 15, 2016
- 5) Staff/Task Force Member Reports
- 6) Adjournment

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such modification or accommodation from the Community Development Department at (949) 497-0712, or (949) 497-0771 (facsimile). Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility at the meeting.

cc: Director of Community Development
City Clerk

Senior Housing Task Force Final Report

Appendix B – CSU Fullerton Survey - “Assessing the Housing Needs of Seniors in Laguna Beach: A Mail Survey”

Note: Due to the size of the agenda bill, Appendix B is available online linked to the agenda bill and a hard copy has been placed in the City Council office. If you would like a hard copy of this Appendix B, then please contact the City Clerk



SOCIAL SCIENCE RESEARCH CENTER
CALIFORNIA STATE UNIVERSITY
FULLERTONTM

Assessing the Housing Needs of Seniors in Laguna Beach: A Mail Survey

Submitted To:

Gregory Pfof
Director
City of Laguna Beach
Community Development

Submitted By:

Gregory Johnson, BA
Project Manager

Laura Gil-Trejo, MPH, MA
Director

Social Science Research Center
California State University, Fullerton
800 N. State College Blvd, MH-038
Fullerton, CA 92834
Telephone: (657) 278-7691
Fax: (657) 278-4153
E-mail: lgil-trejo@exchange.fullerton.edu



TABLE OF CONTENTS

Contents

EXECUTIVE SUMMARY	1
INTRODUCTION	4
RESULTS	5
Demographics Characteristics and Net Worth	5
Residential and Household Characteristics	8
Daily Living and Use of Services	11
Planning for the Future	20
Lifelong Laguna	24
APPENDIX A	27
APPENDIX B	35

EXECUTIVE SUMMARY

Between July 24th and August 25th, 651 completed surveys from adults 55 years of age and older residing in the City of Laguna Beach were collected by the Social Science Research Center, at California State University, Fullerton. The average survey respondent is Caucasian, seventy years of age, married, owns their home, resides in a single family dwelling and had lived in Laguna Beach approximately 31 years. An equal proportion of surveys was received by male and female respondents. While the largest proportion of respondents is retired and receiving social security, more than a third is still employed. The personal annual income of survey respondents varies widely ranging from less than \$25,000 (10.0% of sample) to over \$200,000 (18.0% of sample); however the largest proportion of respondents earns \$100,000 to \$150,000 per year (23.0% of survey respondents). As it pertains to meeting the future housing needs of Laguna Beach's maturing population, the key findings are as follows:

- The majority of survey respondents (83.5%) are either "very" or "somewhat" interested in planning for their older years.
- Eighty four and two tenths percent expressed plans to live in their same residence as they got older, and 89.0% expressed the intention to continue to reside in the City of Laguna Beach.
- Cost of living in Laguna Beach and the presence of stairs were the reasons most frequently cited by those who did not express the intention to age in place or remain in the City of Laguna Beach.
- Interestingly, a lower proportion of younger seniors (55-64) expressed the intention to age in place and to continue residing in Laguna Beach than older seniors (65+).
- Asked to rate the factors most important to their future housing needs, being able to stay in one's current home was rated mostly highly, with nearly nine in ten respondents stating it was either "very important" or "important." The next most important factor was being able to live in a well maintained building, having access to public transportation, being able to make modifications to one's home to continue living there, and having a home that was single story.
- Relatedly, 73.2% of survey respondents report having to climb stairs in order to gain entry into their home, to move between rooms in their home, or both suggesting that physical modifications will be needed to the extent that the mobility of senior residents is compromised.

- While physical modifications will be needed for those residents who wish to age in place but for whom physical mobility becomes a concern, maintaining or improving current rates of physical mobility among Laguna Beach’s senior residents should be a priority. Fortunately, the results of the current survey suggest that adults 55 years of age and older prioritize remaining healthy. In fact, more than eight in ten survey respondents felt it was either “a very high priority,” or “a high priority” to ensure that all older adults in Laguna Beach are able to stay healthy, involved, and in their Laguna Beach residence.
- As it relates to preparing for the future housing needs of Laguna Beach’s senior population, it is important to note, that survey respondents placed very little importance on being able to live in a senior-only community or an assisted living establishment.
- Based on qualitative information gathered during the data collection process, it is clear that many individuals who were surveyed do not consider themselves to be “senior” citizens. This suggests that, at least for some mature adults, the term has negative connotations or is inconsistent with the way they view themselves. The results of the survey suggest that those 55 years of age or older residing in Laguna Beach lead socially and civically rich lives, and take on diverse responsibilities.
- As already noted 38% of the survey sample is still employed. Thirty four and two tenths percent of those in the study sample volunteer at least “somewhat often,” and the majority (95.5%) drives their own vehicle.
- Slightly more than one quarter of respondents (27.0%) reside alone. Of those who do not live alone, the majority live with their spouse. However, respondents also report living with adult children, dependent children, grandchildren, friends, roommates, significant others and other family members.
- Sixty five respondents (almost 10.0% of the entire sample or 14.8% of those who do not live alone) report caring for at least one other person. While the majority of these respondents care for their spouse, others care for one or more adult children, a family member, roommates, friends, or grandchildren.
- Less than 5% of all survey respondents (3.7%) utilize the services of a caretaker.
- While the majority of survey respondents report using outside services such as house cleaning or a handyman for home repairs (77.9%) less than 20% (16.5%) report using a referral service to find such contractors. Word of mouth is likely the most common vehicle through which residents 55 years of age or older connects with outside contractors.

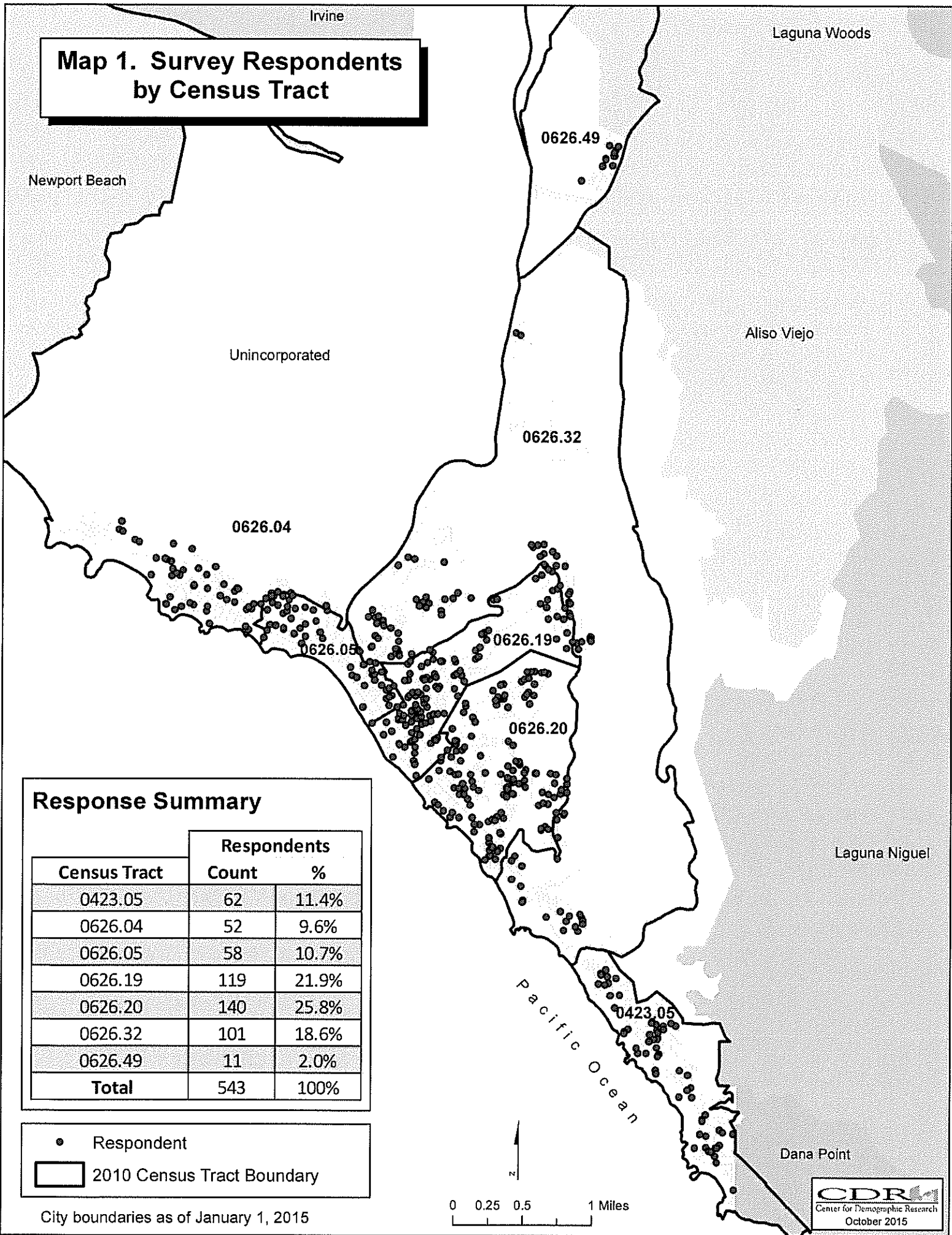
- Thirty two percent of survey respondents utilize the services available at the Susi Q. Of those who do not avail themselves of such services, the largest percentage report being too busy with personal interests. The use of services geared for older Laguna Beach residents whether offered by the Susi Q, the City of Laguna Beach, or some other agency is generally low among those in the study sample. Part of the reason for this limited use could be lack of knowledge. In fact, 43.1% of respondents felt that they did not have enough information about the services offered by the Susi Q. Nearly a third (31.2%) felt they had insufficient information about the services available to them more generally.
- Future studies should explore whether residents 55 years of age or higher do not utilize these services because they do not qualify for them, they don't need them, or because they view them as potentially stigmatizing.
- The majority of individuals who provided a response (61.2%) would be interested in adapting their home to be senior friendly if the City instituted an incentive program with reduced fees.
- Moreover, 61.2% of responding survey completers would be willing to join Lifelong Laguna.
- Of those who would be willing to join Lifelong Laguna, the largest percentage (27.1%) would be willing to pay \$100/month membership fee. However it should be noted that amount residents report willing to pay per month to belong to Lifelong Laguna is strongly related to annual income, such that those who earn more are more willing to spend \$100 or more/month in membership fees. Thus it is suggested that a sliding scale based on annual income be used to determine monthly membership dues.
- More than nine in ten survey respondents has regular internet access in their home, which suggests that the internet is a viable avenue for marketing Lifelong Laguna to those represented in the survey sample.
- In considering the scope of services to be offered through Lifelong Laguna, it should be noted that two in ten respondents reported being a victim of fraud or identity theft. Furthermore more than half of survey respondents do not have a disaster preparation plan. These data suggest that workshops/seminars or online training as to how to avoid identity theft or fraud might be needed as well as hands on assistance in preparing the senior community for a natural disaster.

INTRODUCTION

The Senior Housing Task Force (SHTF) of Laguna Beach was formed in mid-2014 to address the housing needs of senior residents of the City of Laguna Beach. One of the main objectives of the SHTF is to explore methods of helping senior residents to “age in place.” The so called Village Movement provides one possible solution especially suited to Laguna Beach given the large population of seniors and the absence of an assisted living facility within the city. A virtual village is a collection of coordinated programs and services designed to help senior citizens remain independent and within their home for as long as possible. Essentially the programs and services normally offered within an assisted living facility are extended out to individual households. The SHTF has proposed a virtual village they have entitled Lifelong Laguna. Lifelong Laguna will be a collection of coordinated services for senior residents that will be readily available from within one’s house. The services would extend, improve, and add to those already offered through the Laguna Beach Senior Center, the Susi Q. To probe interest and support in the senior community for Lifelong Laguna, the SHTF commissioned the Social Science Research Center (SSRC) at California State University, Fullerton to administer a mail-based survey designed to assess senior housing needs to a sample of senior residents in Laguna Beach.

On July 14th, the SSRC mailed a paper-pencil survey to 2,977 Laguna Beach addresses thought to contain at least one person 55 years of age or older. Between July 24th and August 25th, 651 surveys were returned resulting in a final response rate of 19.1%. A detailed description of the study methodology is presented in Appendix A; however, it is worth noting that the final sample under-represents those between the ages of 55 and 64 and over-represents those over the age of 65. Therefore, caution is warranted when interpreting the results of this study. The distribution of surveys received by census tract is presented in Map 1. As shown the largest proportion of survey respondents reside in households contained in census tract 0626.20. Meanwhile, the smallest proportion of survey completions was received from addresses contained in tract 0626.49.

Map 1. Survey Respondents by Census Tract

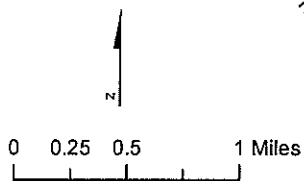


Response Summary

Census Tract	Respondents	
	Count	%
0423.05	62	11.4%
0626.04	52	9.6%
0626.05	58	10.7%
0626.19	119	21.9%
0626.20	140	25.8%
0626.32	101	18.6%
0626.49	11	2.0%
Total	543	100%

- Respondent
- 2010 Census Tract Boundary

City boundaries as of January 1, 2015



RESULTS

Demographics Characteristics and Net Worth

The percentage breakdown of age (grouped into decades), gender, and self-identified race/ethnicity are presented in Table 1 for those who provided a response. Age was obtained by subtracting each respondent's birth year from 2015. Ages ranged from 55 to 95 with a mean age of 71.6 years and a median age of 71.0 years. Nearly equal proportions of respondents were male ($n = 331$, 51.5%) and female ($n = 312$, 48.5%). The majority of the sample was White ($n = 569$, 92.5%). No race/ethnicity other than White made up more than 5% of the sample.

Table 1: Demographics of the Sample

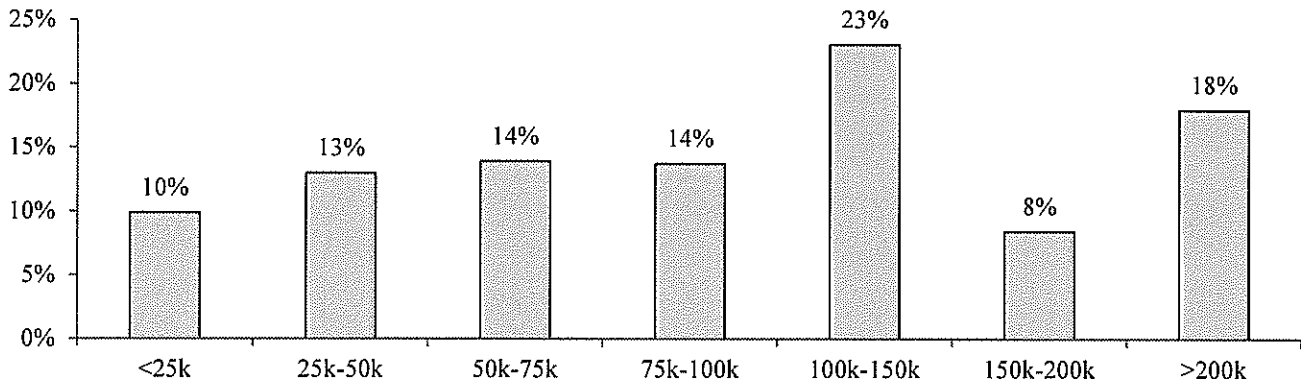
Demographic		Percentage
Race/Ethnicity	White	569 (92.5%)
	Hispanic/Latino	23 (3.7%)
	Asian/Pacific Islander	16 (2.6%)
	Black	4 (0.7%)
	Native American	3 (0.5%)
	Total	615 (100%)
Gender	Male	331 (51.5%)
	Female	312 (48.5%)
	Total	643 (100%)
Age	55-64	141 (22.5%)
	65-74	255 (40.7%)
	75-84	177 (28.3%)
	>85	53 (8.5%)
	Total	626 (100%)

The majority of survey respondents were married ($n = 362$, 56.8%), followed by 26.2% who were single ($n = 167$), 14.1% who were widowed ($n = 90$) and 2.8% who were in a domestic partnership ($n = 18$). Fourteen respondents declined to state their relationship status. A larger proportion of older seniors (age 55 and older) were widowed ($n = 84$; 17.6%) than younger seniors (age 45 to 54; $n = 4$; 2.9%)¹.

Five hundred forty six survey respondents (83.9%) provided information on their personal annual income. As shown in Figure 1, the largest proportion of respondents ($n = 126$, 23.1%) earned between \$100,000 and \$150,000 annually, followed by the second largest proportion who reported an annual income of over \$200,000 ($n = 98$, 17.9%). Nearly equal proportions of respondents were within the \$25,000 to \$50,000 ($n = 71$, 13.0 %); \$50,000 to \$75,000 ($n = 76$, 13.9%); and \$75,000 to \$100,000 ($n = 75$, 13.7%) income brackets. Less than 10% made \$150,000 to \$200,000 ($n = 46$, 8.4%) or less than \$25,000 a year ($n = 54$, 9.9%).

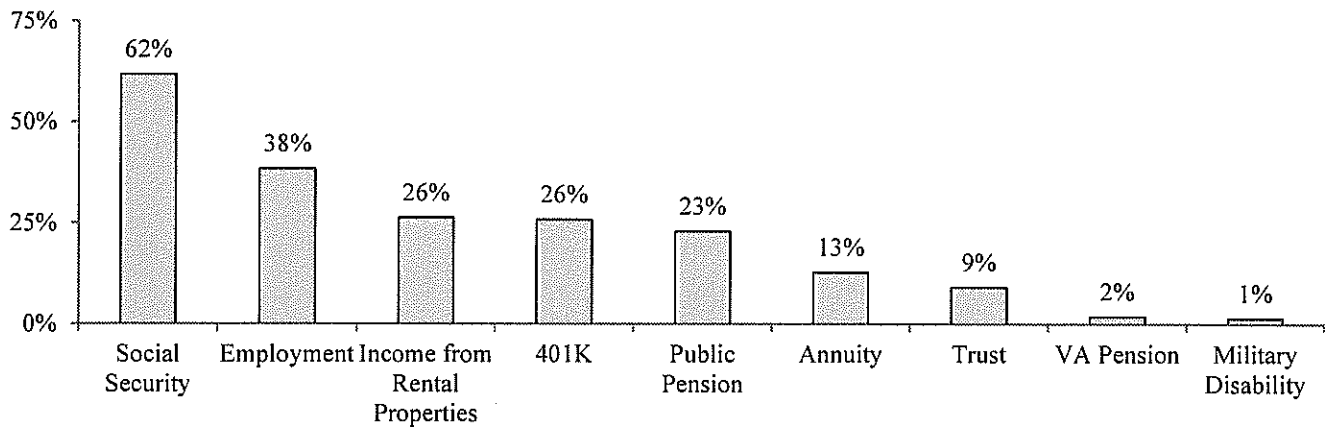
¹ $\chi^2(3) = 19.255, p < .001$.

Figure 1: Personal Annual Income of Survey Respondents



Respondents reported which of nine sources accounted for their personal annual income. As might be expected, the most common source of income was social security ($n = 402$, 61.8%) followed by employment ($n = 250$, 38.4%). VA pensions and military disability were not common sources of income among those in the study sample. Because respondents were allowed to select more than one source of personal income, the percentages in Figure 2 do not sum to 100%.²

Figure 2: Sources of Income



To investigate the relationship between income source and personal annual income, responses to the two survey items were cross-tabulated, and the results are presented in Table 2. As would be expected, a larger proportion of respondents with employment as a source of income make more than \$200,000 a year ($n = 61$, 28.4%) than those who get income from social security ($n = 38$, 11.3%) and public pensions ($n = 14$, 10.6%). In addition, a larger proportion of respondents getting income from social security ($n = 200$, 59.6%) and public pensions ($n =$

² Questions with a “check all that apply” response format will have percentages that do not add up to 100% because the response choices are not mutually exclusive. Questions that did not have mutually exclusive answer choices will have this disclaimer when reported in the results.

74, 56.1%) make less than \$100,000 a year compared to those still employed ($n = 73, 34.0\%$). The cross tabulated data confirm that senior residents who are still employed tend to make more than those who have social security or public pension as sources of income.

Table 2: Personal Annual Income by Selected Income Sources

	Social Security	Public Pension	Employment
Less than \$25,000	35 (10.4%)	6 (4.5%)	10 (4.7%)
\$25,000-\$49,999	53 (15.8%)	12 (9.1%)	22 (10.2%)
\$50,000-\$74,999	54 (16.1%)	27 (20.5%)	23 (10.7%)
\$75,000-\$99,999	58 (17.3%)	29 (22.0%)	18 (8.4%)
\$100,000-\$149,999	75 (22.4%)	34 (25.8%)	58 (27.0%)
\$150,000-\$199,999	22 (6.6%)	10 (7.6%)	23 (10.7%)
Greater than \$200,000	38 (11.3%)	14 (10.6%)	61 (28.4%)
Total	335 (100%)	132 (100%)	215 (100%)

As would be expected, age was also related to income source. A larger proportion of older residents reported social security as a source of income ($n = 368, 75.9\%$) than did younger seniors ($n = 18, 12.8\%$)³. Additionally, a larger proportion of older seniors received a public pension ($n = 128, 26.4\%$) than did younger seniors ($n = 14, 9.9\%$)⁴. Finally, a larger proportion of younger seniors still reported employment as a source of income ($n = 96, 68.1\%$) than did their older counterparts ($n = 142, 29.3\%$)⁵.

A question on the survey inquired, “Considering your assets and liabilities, which of the following best describes your net worth?” The majority of survey respondents ($n = 471, 78.2\%$) were worth more than \$500,000⁶. Forty seven (7.8%) respondents were worth \$250,000 to \$500,000. Nearly equal proportions reported a net worth of between \$100,000 and \$250,000 ($n = 26, 4.3\%$) and \$50,000 to \$100,000 ($n = 24, 4.1\%$). The remaining 34 respondents (5.6%) reported a net worth of less than \$50,000.

³ $\chi^2(1) = 182.88, p < .001$

⁴ $\chi^2(1) = 23.07, p < .001$

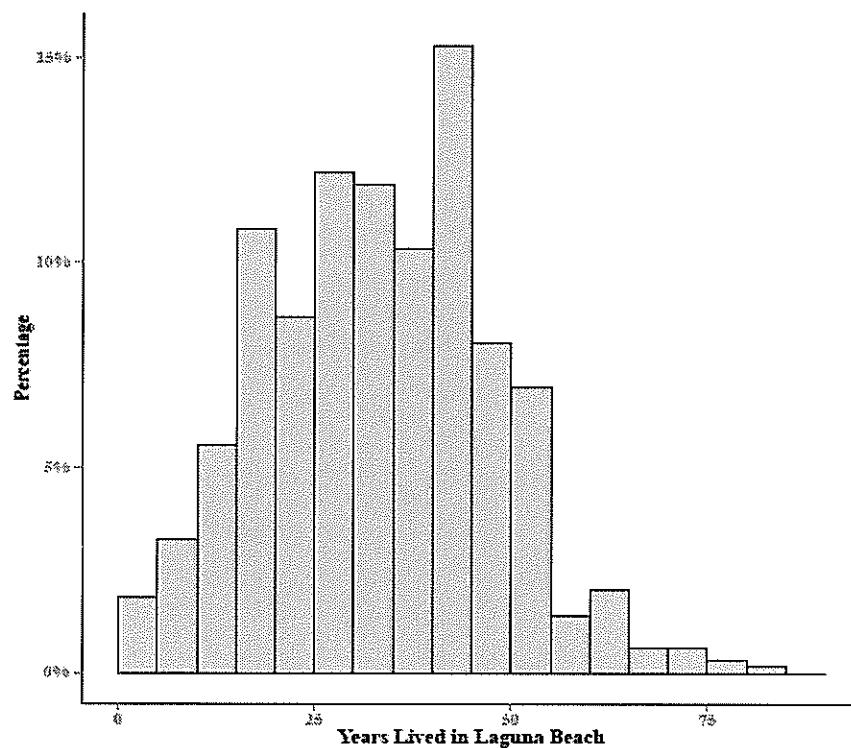
⁵ $\chi^2(1) = 68.18, p < .001$

⁶ The majority may be worth more than \$500,000 because, as reported in the Residential and Household Characteristics section, the majority of respondents own a single family dwelling and the average price of a home in Laguna Beach is well over \$500,000 (Zillow).

Residential and Household Characteristics

Figure 3 illustrates the number of years respondents reported living in Laguna Beach. There were seven respondents who did not give an exact value, but instead offered an estimate appended with a plus e.g. “22+.” These responses were retained but the pluses were removed. The mean number of years living in Laguna Beach amongst those in the survey sample was 32.3, and the median was 31. The discrepancy between the mean and median value is due to the small number ($n = 28$) of senior residents who have lived in Laguna Beach for over 55 years. Two individuals have lived in Laguna Beach for 79 and 80 years. The shortest length of time residing in Laguna Beach was one year.

Figure 3: Number of Years Lived in Laguna Beach



When asked if they owned or rented the place they resided in, 571 (90.0%) survey completers indicated that they owned their residence. Sixty-four, on the other hand, (10.0%) rented their place of residence. A larger proportion of older seniors ($n = 445, 92.3%$) owned their residence than younger seniors ($n = 117, 83.6%$)⁷.

Asked which of five categories described their place of residence best, the majority of survey respondents selected “single family dwelling” ($n = 547, 84.5%$). Equal proportions reported residing in a condominium ($n =$

⁷ $\chi^2(1) = 8.56, p < .01.$

37: 5.7%) or townhome ($n = 37, 5.7\%$). Those who lived in a mobile/motor home, a duplex, an “R2 Zone⁸” and “non-conforming dwellings⁹” completed the remaining 4.1% of the distribution.

To explore the relationship between home ownership and residence type, these two variables were cross tabulated. The resulting data are presented in Table 3. A higher proportion of those who own their residence ($n = 520; 91.0\%$) live in a single family dwelling compare to those who rent ($n = 54; 37.5\%$). Conversely, a lower proportion of those who own their residence describe living in an apartment ($n = 4; 0.7\%$) compared to those who rent ($n = 32; 5.0\%$).

Table 3: Type of Residence vs. Ownership of Residence

Residence Type	Own Count (%)	Rent Count (%)	Total Count (%)
Single family dwelling	520 (91.0%)	24 (37.5%)	544 (86.0%)
Apartment	4 (0.7%)	32 (50.0%)	36 (6.0%)
Condominium/townhome	31 (5.4%)	5 (7.8%)	36 (6.0%)
Duplex	11 (2.0%)	2 (3.1%)	13 (2.0%)
Motor Home	5 (0.9%)	1 (1.7%)	6 (1.0%)
Total	571 (90.0%)	64 (10.0%)	635 (100.0%)

It is well known that there is a negative relationship between age and mobility. That is, on average younger people are more mobile than older people, and that mobility decreases as we get older. As senior residents age, homes with multiple stories or built with entrances or exits containing stairs may pose a problem for seniors wishing to age in place. An item on the survey instrument inquired, “Do you have to climb stairs to get into your home or to move between rooms in your home,” to assess the extent to which physical modifications may be needed in the homes of seniors who wish to age in place. Only 26.8% ($n = 172$) of those who responded indicated that their home did not require them to climb stairs. Nearly one in five respondents ($n = 119; 18.6\%$) reported having to climb stairs to get in and out of their residence. Another 23.6% ($n = 151$) have multiple stories in their home requiring them to climb stairs to move between rooms inside their home. The largest proportion of respondents ($n = 199; 31.0\%$) indicated having to climb stairs for both purposes, to gain entry into their home and to move between rooms. Thus, 73.2% of those in the study sample use stairs to varying degrees

⁸ A zoning code for a dwelling that can but not necessarily does contain two families.

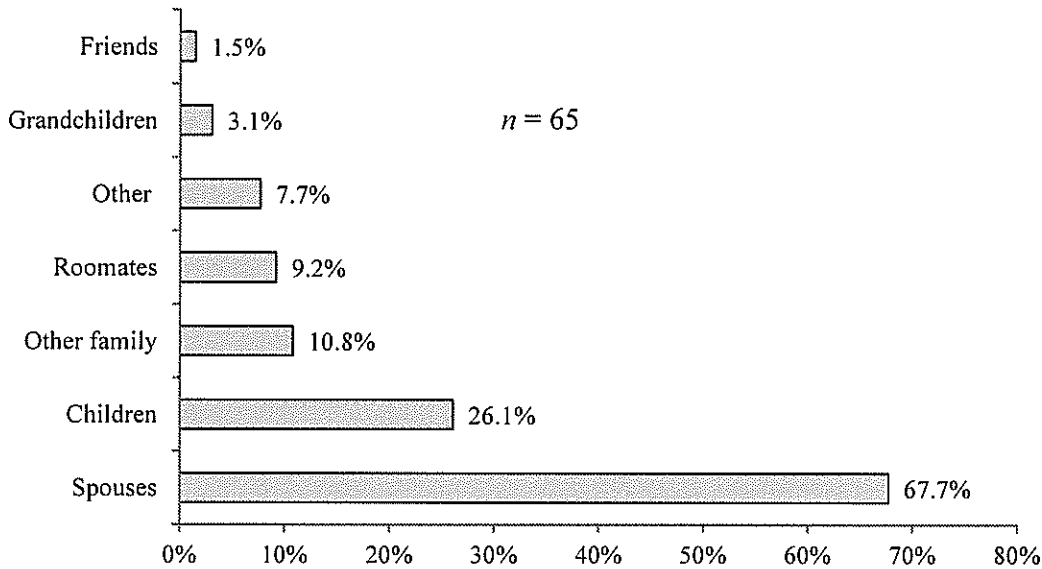
⁹ A legal dwelling that does not conform to current housing/zoning requirements.

in their homes, suggesting that physical modifications (e.g. installing ramps in place of stairs) will be needed to help a subset of the senior resident population in Laguna Beach age in place.

Only 614 (94.3%) respondents provided information on the size of their household. Of these, about one in four ($n = 176$, 27.0%) report living alone. The remaining respondents report living with between one and five individuals, not including themselves. Of those who did not live alone, the majority ($n = 355$; 81.1%) live with one other person, 12.8% ($n = 56$) with two, 4.8% ($n = 21$) with three, and less than 1.0% live with four ($n = 4$; 0.9%) and five ($n = 2$: 0.5% individuals). When respondents who did not live alone were asked about the composition of their household, the majority reported living with their spouse/significant other ($n = 371$, 84.7%), followed by adult children ($n = 79$, 18.0%) and friends ($n = 18$, 4.1%). Fourteen survey respondents (3.2%) live with family members other than adult children or grandchildren, and eleven each (2.5%) live with grandchildren and roommates. Four respondents live with one or more dependent child, two live with one or more parent, and one each resides with a home caregiver, a great grandson, a “renter,” and a “son’s friend.”

Of the 438 respondents who live with at least one other person and provided a response, 14.8% ($n = 65$) are responsible for the care of another person in their household. Of these respondents, 50 (78.1%) were responsible for the care of one other person; eleven (17.2%) for two; one (1.6%) for three; and two (1.3%) for the care of four others. Asked to describe who in their household they provide care for, the majority ($n = 44$; 66.7%) reported they care for their spouse, as shown in Figure 4. A little over a quarter ($n = 17$; 26.1%) care for between one and three adult children, and approximately one in ten ($n = 7$; 10.8%) care for one other family member. Six respondents (9.2%) care for one to two roommates, five (7.7%) care for two to three grandchildren, and one (1.5%) cares for a friend. Another five respondents reported caring for some “other” person, one of which cared for three children under the age of 18, another for one dependent child, and one for a parent. Looking at the sample overall we see that approximately one in ten individuals ($n = 65$; 10.0%) care for another person within their household.

Figure 4: Persons for Whom Care is Provided in the Home of Residents

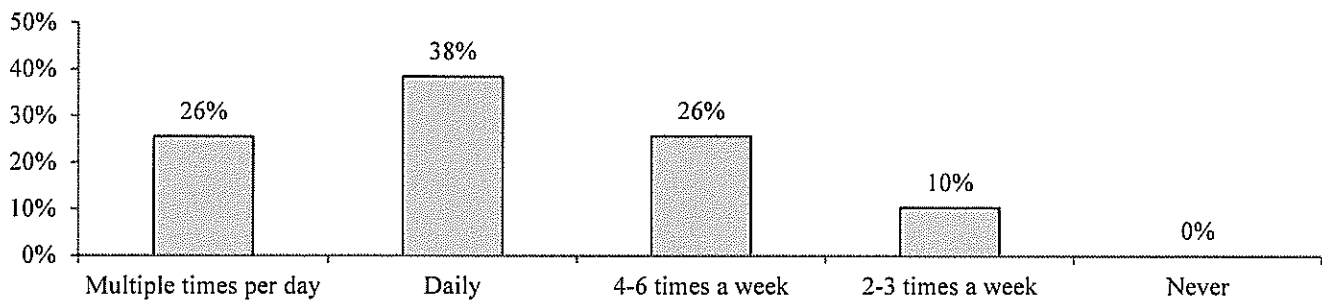


The vast majority of respondents ($n = 616$; 96.3%) do not utilize the services of a caretaker. Fifteen (2.3%) have a caretaker who works in the home but does not live with them, whereas nine (1.4%) have a caretaker who did live in the home. Eleven respondents declined to state whether they had a caretaker working in their home. Of the 24 respondents with a caretaker, 17 (70.8%) hired the caretaker for themselves, five (20.8%) for his or her spouse/domestic partner, and one (4.2%) for his father. One respondent declined to provide this information.

Daily Living and Use of Services

In terms of transportation, 95.5% ($n = 615$) of respondents drive their own car which may explain why only 35.5% ($n = 226$) of respondents used public transportation. Figure 5 illustrates the frequency with which respondents leave their home in an average week for activities/chores/errands. The largest proportion ($n = 245$, 38.4%) of respondents leave their home daily for this purpose. An equal proportion of respondents report doing so multiple times per day ($n = 163$, 25.5%), with an average of four to six times per week ($n = 164$, 25.7%). One in ten respondents leaves their home two to three times per week on average ($n = 66$, 10.0%).

Figure 5: Frequency with Which Respondents Leave Their Home per Week



A lower proportion of older seniors ($n=111$, 23.4%) leave multiple times per day than younger seniors ($n = 46$, 32.9 %). In addition, a larger proportion of older seniors ($n = 139$, 29.3%) leave four to six times a week than younger seniors ($n = 20$, 14.3 %) ¹⁰.

Asked about their use of outside and referral services, 77.9% ($n = 500$) of respondents report using outside services such as house cleaning or a handyman for home repairs, however only 16.5% ($n = 104$) use referral services. Further studies should examine how seniors residing in Laguna Beach identify and select outside service providers to help maintain their home.

When asked “How often do you volunteer in the community?” a little more than two out of five respondents ($n = 283$, 44.8%) report that they don’t volunteer at all and slightly more than one in five ($n = 132$, 21.0%) report doing so “not that often.” However, 19.8% ($n = 125$) report volunteering “somewhat often” and another 14.4% ($n = 91$) report doing so “very often.” Thus, a little more than a third of individuals contained in the study sample ($n = 216$; 34.2%) volunteer at least somewhat often and can be a volunteer base for the Lifelong Laguna project. Whether the remaining 65.8% of the sample do not volunteer because of other commitments, lack of transportation, physical limitations, or lack of knowledge regarding volunteering opportunities should be explored further. Of the 348 (55.2%) respondents who indicated that they volunteer, 46 (13.2%) reported that their volunteer work includes church-related activities. Twenty-nine respondents reported volunteering at a homeless shelter (8.3%), and 17 (4.9%) reported volunteering as a board member for an organization (although few supplied the actual name of the organization). Gardening ($n = 15$, 4.3%), arts-related work ($n = 12$, 3.4%), fundraising ($n = 11$, 3.2%), and teaching ($n = 10$, 2.9%) were the next most common types of volunteer work. Cleaning up trash, school-related work, and Susi Q-related work were each reported by eight (2.3%) respondents. Many types of volunteer work that respondents reported are not given here because of the sheer amount of different types of volunteer work that were given - many types were only reported by seven or less

¹⁰ $\chi^2(3) = 13.95, p < .01$.

respondents. Respondents engaged in an impressively diverse range of volunteer work.

An item on the survey instrument enquired “Do you participate in activities/use services at the Laguna Beach Senior Facility (Susi Q)?” Of the 603 (93.6%) who provided this information, 32% ($n = 193$) responded in the affirmative. The survey then asked respondents to report the specific activities they engage in and services they use. The most common activity or service was “exercise class,” reported by almost one in three ($n = 57$, 29.5%) respondents who use Susi Q services/activities. The next most common was “classes” ($n = 28$; 8.8%) although respondents who gave this answer unfortunately did not specify the name of the class. This was followed by yoga ($n = 27$, 14.0%), walking or hiking ($n = 16$, 8.3%), computer assistance classes ($n = 15$, 7.8%), bridge or bingo ($n = 12$, 6.2%), health-related services (e.g. the health expo, flu shots; $n = 11$, 5.7%), and tax-related services ($n = 9$, 4.7%). Finally, “Monday at the Movies,” art classes and shows, legal services, the library, and “lunch” were each reported by eight (4.1%) respondents. In the interest of concision and space, services and activities reported by less than eight respondents are not given. However, as a whole, the activities and services listed by respondents were diverse.

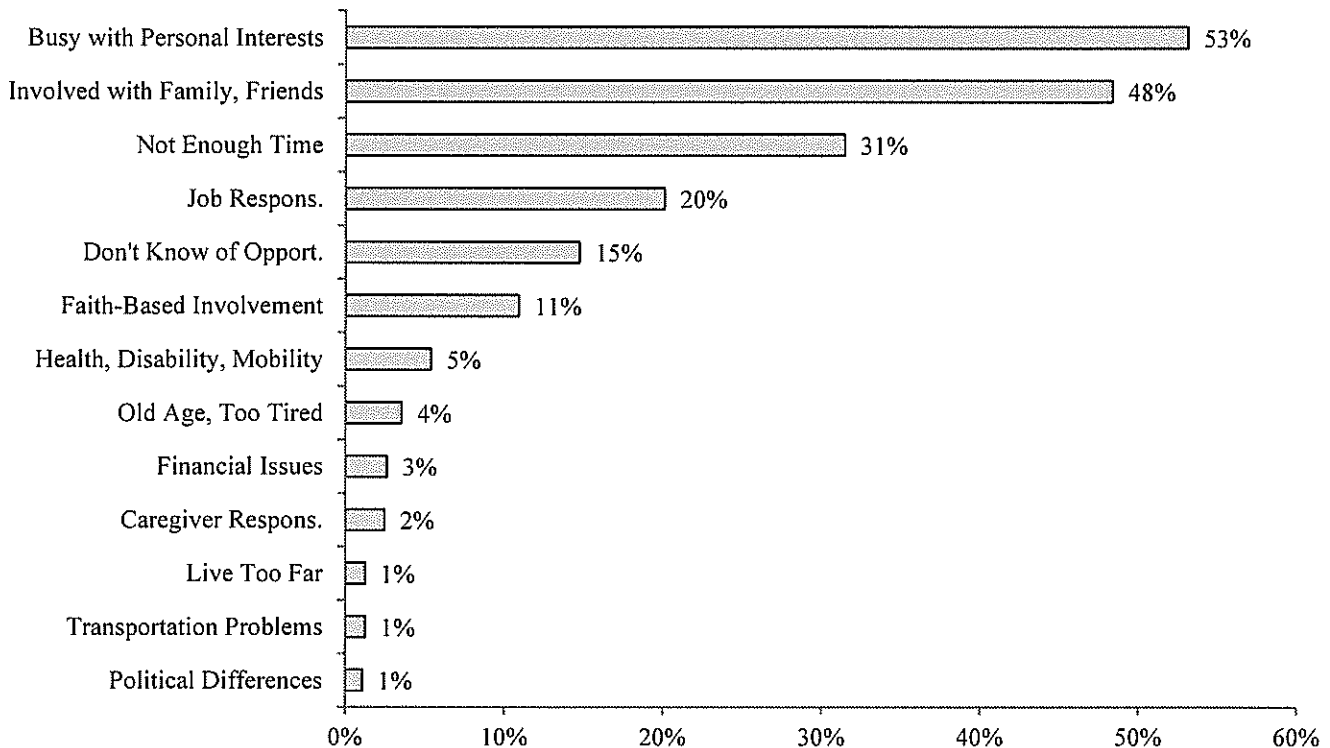
Those who did not use the Susi Q ($n = 410$) selected up to 13 factors that serve to limit their involvement in the center. Close to a third ($n = 185$, 28.4%) of respondents selected only one factor. Another third ($n = 195$, 30.0%) endorsed two factors; 19.2% ($n = 125$) three factors; 9.8% ($n = 64$), four factors; and 4.6% ($n = 31$) 4.6%) selected five or more factors.

The percentage of respondents endorsing each of the 13 factors as a reason for not being involved with the center is presented in Figure 6. Note that because respondents were able to endorse more than one factor, the sum of the percentages in Figure 6 is greater than 100%.

The two most common reasons were being busy with personal interests ($n = 346$, 53.1%) and involvement with family, friends, etc. ($n = 315$, 48.4%). These were followed by not having enough time ($n = 206$, 33.1%) and job responsibilities ($n = 147$, 23.6%). Some common reasons not shown in Figure 6 that seniors wrote under the response option “Other” were having other interests that kept them busy (e.g. golf, travel, volunteering; $n = 12$) and not feeling old enough for the services and activities offered by the Susi Q ($n = 11$). Importantly 15% of survey respondents report not availing themselves to the services and activities offered through the Susi Q because they are not aware of the opportunities offered.

A larger proportion of older seniors ($n = 32, 6.6\%$) cited health, disability, and mobility as reasons for not utilizing Susi Q services than did younger seniors ($n = 2, 1.4\%$)¹¹. On the other hand, a larger proportion of younger seniors ($n = 43, 30.5\%$) cited job responsibilities than did older seniors ($n = 81, 16.7\%$)¹².

Figure 6: Reasons for not Using Susi Q Services/Programs



Asked to indicate which of five senior services available offered by the City of Laguna Beach they utilized, only 14.3% ($n = 83$) reported attending classes, workshops or presentations specifically geared for seniors. Only fifteen respondents (2.3%) avail themselves of Sally’s Funds, and 13 (2.0%) attend support groups such as Feeling the Blues, Coffee Talk, Grief and Loss, or Baby Booming. Less than 1% of survey respondents use Meals on Wheels ($n = 3; 0.5\%$) or Laguna Beach Seniors Care Management Program ($n = 3; 0.6\%$). It is unclear whether the limited use of these services is due to lack of eligibility, lack of knowledge, or potential stigma associated with using these services. As mentioned previously, many of the younger seniors may not consider themselves “seniors” yet. To the extent that services are singled out as being directed towards seniors, adults who do not identify with this title will likely avoid their usage.

¹¹ $\chi^2(1) = 4.74, p < .05$.

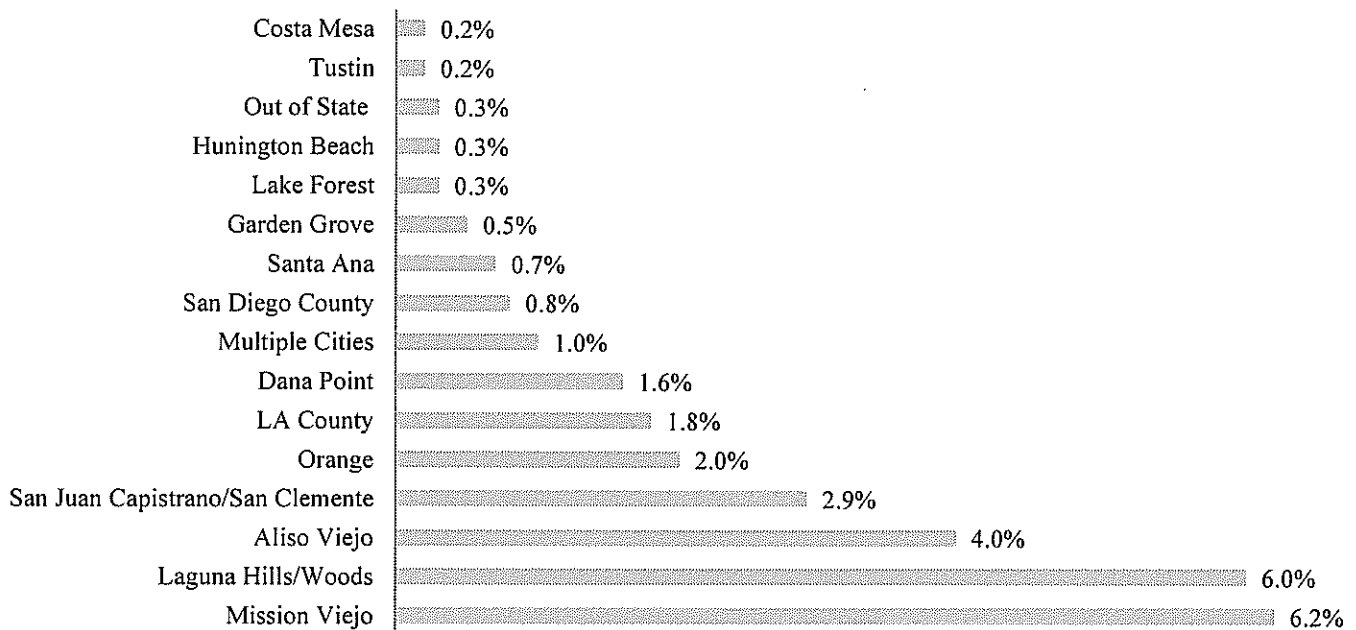
¹² $\chi^2(1) = 12.23, p < .001$.

Looking at other services available to seniors, but not necessarily offered through the City, less than 1% report using “Visiting angels or other caregiver service organizations,” ($n = 5$; 0.8%) and “Home care services such as bath services, housekeeping, and meal preparation.” Thirteen respondents report using some “other” service including: 1) “Age Well Senior Services;” 2) “Bridge;” 3) “Husband-Senior Health;” 4) “Income tax [assistance];” 5) “Private pay caregiver;” and 6) “Kaiser.”

Respondents indicated which of three specific medical services they currently utilize (urgent care, prescription delivery, and medication management), as well as described “other” medical services they currently use, if applicable. The majority of survey respondents ($n = 481$; 73.9%) reported not using any of these three services, nor did they report utilizing “other” types of medical services. Nearly one quarter ($n = 150$; 23.0%) reported using one medical service, and less than five percent each reported utilizing two ($n = 18$; 2.8%) and three ($n = 2$; 0.3%) services. The largest proportion of respondents ($n = 73$; 11.2%) reported currently using prescription delivery services, and the next largest proportion ($n = 62$; 9.5%) utilize urgent care facilities. Only eight respondents (1.2%) reported using a medication management service. Forty nine (7.5%) respondents reported the use of “other” medical services including the VA, specific hospitals, Kaiser, primary care physicians or doctors, Sleepy Hollow, community clinics, RNs, various insurance plans, dentists, specialists, Caduceus, UCI, Senior Advice, personal caregivers, and hospice.

Two survey questions addressed the city in which respondents’ primary care physicians operate, as well as at which hospital they seek emergency care or medical assistance. Six hundred thirteen respondents reported the cities in which their primary care providers are located, which ranged from as close as Laguna Beach to as far as out of state. The largest proportion of survey respondents (34.3%; $n = 210$) indicated that their primary care physician operates in the City of Laguna Beach (See Figure 9). The next three largest proportions have primary care physicians operating in the cities of Newport Beach ($n = 88$, 14.4%), Laguna Niguel ($n = 71$, 11.6%), and Irvine ($n = 68$, 11.1%). Figure 7 illustrates the percentage of respondents who identified one of the remaining 16 locations. Note that six respondents stated their primary care physician operated in multiple locations and that two reported they operated outside of the state (in Arizona and Colorado, respectively). The figure suggests that while many respondents have primary physicians within the City of Laguna Beach, the majority go outside of Laguna Beach to one of its neighboring cities. The number of physicians decreases as one moves further away from Laguna Beach; however, a sizeable number of respondents are willing to make the 25 or so minute drive to Newport Beach or Irvine to see their primary physician.

Figure 7: City of Primary Physician



All but ninety respondents provided the name of the hospital they use when they seek emergency/medical assistance. In total, 12 hospitals were named by these 588 respondents, with 39 (6.6%) respondents indicating they use some combination of the 12. More than half of the survey respondents who provided a response ($n = 300$; 21.0%) attend Mission Hospital, either in Mission Viejo or Laguna Beach. The next largest proportions attend Hoag Hospital ($n = 116$; 19.7%) and Kaiser ($n = 66$; 11.2%). The remaining nine hospitals, along with the proportion of respondents who attend them, are depicted in Table 4 (in descending order of frequency).

Table 4: Hospital of Choice for Emergency Medical Care

Hospital	Count	%
Saddleback Hospital	40	6.8%
UCI Medical Center	10	1.7%
St Joseph's	7	1.2%
VA Hospital in Long Beach	3	0.5%
UCLA/ USC	2	0.3%
Anaheim Memorial	2	0.3%
St. Jude Hospital	1	0.2%
Scripps-Torrey Pines	1	0.2%
Naval Hospital in Camp Pendleton	1	0.2%

To determine how Lifelong Laguna Village can effectively supply senior residents with services that enable them to age in place, it is important to assess how much senior residents already know about services currently available to them. Two items on the survey instrument addressed this knowledge. Asked whether they felt they had enough information about the types of services available to them, slightly more than one in three respondents ($n = 197$, 31.4%) indicated they did not. Of the 431 individuals who reported having enough information about the types of services available to them, twenty five (6.3%) did not know how to go about accessing these services.

Looking specifically at the programs and services offered by the Laguna Beach Senior Center, 264 (43.1%) of those who provided a response indicated not having enough information about them. As shown in Table 5, knowledge about the services offered at the Susi Q is related to knowledge of available services overall. Of those who indicated having enough information about the types of services available to them, 79.6% also had enough information regarding the services offered by the Susie Q. In contrast, only 8.5% of the 189 who did not have enough about the types of services generally available to them were aware of the types of services offered at the Susi Q.

Table 5. Knowledge of Available Services by Type of Service

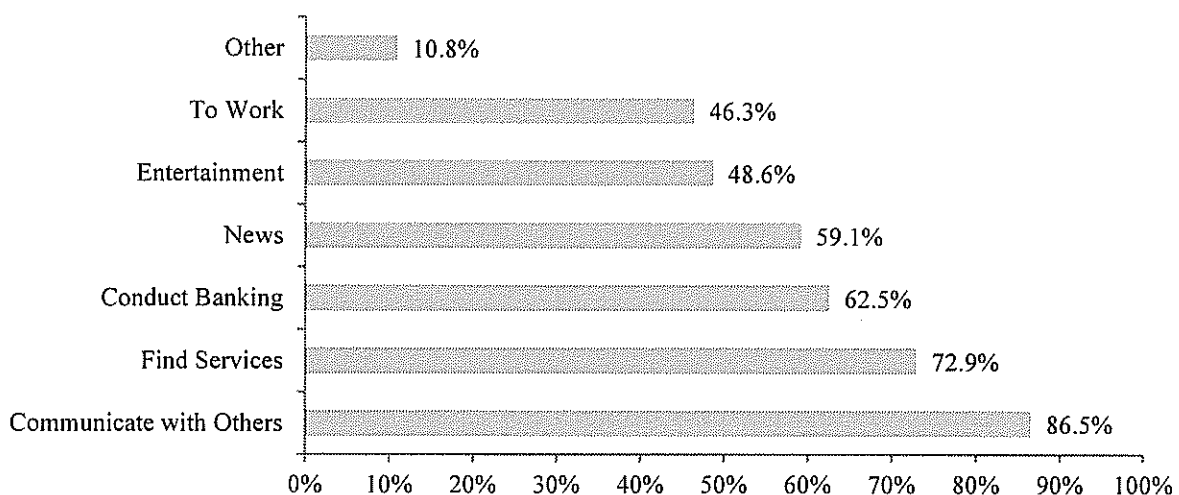
Enough Info About Susi Q Services	Enough Info About General Services Available		Totals
	Yes	No	
Yes	332 (79.6%)	16 (8.5%)	348
No	85 (20.3%)	173 (91.5%)	258
Totals	417	189	606

Lack of information is worrying as it effectively prevents some respondents from utilizing services that may be of great benefit to them. In addition, the under-utilization of these services may create the illusion that the need for them is lower than it actually is. Successfully addressing this problem will require research into how to effectively disseminate information about available services to the seniors that may need them. The ideal would be for 100% of senior residents in Laguna Beach to know about the services available to them and how to access them, especially those services that enable them to age within their Laguna Beach homes (like the proposed Lifelong Laguna Village).

One possible avenue of spreading information about senior services is through the internet. Fortunately, the vast majority of respondents have access to the internet in their residence ($n = 602$, 94.4%). Of these, the majority ($n = 501$; 84.8%) use the internet “very often” during an average week and another 9.1% ($n = 54$) report doing so “somewhat often,” meaning that 93.7% of those who have internet access in their home utilize it somewhat or very often. Only thirty seven respondents with internet access in their home use it “Not that often,” ($n = 29$; 5.0%) or “Not at all” ($n = 8$; 1.4%) in an average week. The results suggest that using the internet as an avenue for marketing services available to senior residents would reach nine in ten survey respondents in the study. Other methods of disseminating information about the types of services available to senior residents in the City of Laguna Beach should be considered to ensure adequate coverage. For the vast majority of senior residents, more extensive online resources (about senior services) and more aggressive marketing of how to access these online resources should be considered.

As a follow up question, an item on the survey instrument read, “For what reason do you access the internet?” Respondents with access to the internet in their residence selected up to seven pre-determined responses and/or provided some “other” reason. As illustrated in Figure 8, communication was the most common reason ($n = 521$, 86.5%) for using the internet, followed by finding services ($n = 439$, 72.9%) and conducting banking ($n = 376$, 62.5%). Other responses included, “making travel arrangements,” “shopping,” “stock market,” “tracking weather,” “writing columns,” “looking for maps,” “photography,” “miscellaneous,” “look up information quickly,” and “for children when they visit.” Because respondents could select more than one reason, the percentages in Figure 10 sum to more than 100%.

Figure 8: Reasons for Internet Use



Two differences emerged with regard to the reasons older and younger senior residents utilize the internet. A larger proportion of younger seniors ($n = 83, 58.9\%$) used the internet for entertainment than older seniors ($n = 209, 43.1\%$)¹³. Additionally, a larger proportion of younger seniors ($n = 85, 60.3\%$) used the internet for work than the older seniors ($n = 181, 47.0\%$)¹⁴.

Respondents who had internet access from their home also indicated which type(s) of device(s) they use to access the internet: a laptop/desktop, tablet, smartphone, or combination thereof. Sixteen respondents declined to provide a response to this follow-up item. Of those who did provide a response, 219 (37.3%) reported using all three devices to access the internet, while 197 (32.7%) reported using only one device to do so. Finally, 170 (29.0%) respondents utilized two of the three devices when accessing the internet.

More than nine in ten survey respondents who provided information utilize a desk top or lap top computer to access the internet. The percentage of respondents who utilize a tablet or a smartphone to access in the internet drops precipitously; however, more than 50% ($n = 352; 58.6\%$) utilize a smartphone and slightly less than 50% ($n = 282; 46.8\%$) use a tablet. Thus, approximately half of the survey respondents use a device other than their home computer or laptop to access the internet. Age is related to the use of smartphones and tablets to access the internet among those who have access in their home. More specifically, a larger proportion of younger seniors ($n = 78, 55.3\%$) used tablets for internet than did older seniors ($n = 201, 41.4\%$)¹⁵; and a larger proportion of younger seniors ($n = 100, 70.9\%$) used smartphones for internet than did older seniors ($n = 249, 51.3\%$)¹⁶.

Looking at other types of services that senior residents of Laguna Beach might need, questions in the survey instrument addressed exposure to fraud/identify theft and presence of an emergency preparedness plan. One hundred forty five respondents, or more than two in ten (22.7%), reported personally being a victim of identity theft or fraud. Services that assist senior residents to avoid victimization and recuperate financially and emotionally from such violations should be explored further. Assistance with the development of a realistic emergency preparation plan is also a pressing need among older adults residing in the City of Laguna Beach: slightly less than six in ten respondents ($n = 355; 57.4\%$) reportedly do not have one established in their household, putting them at risk in the event of a natural disaster.

¹³ $\chi^2(1) = 10.30, p < .01.$

¹⁴ $\chi^2(1) = 22.64, p < .001.$

¹⁵ $\chi^2(1) = 7.96, p < .01$

¹⁶ $\chi^2(1) = 16.20, p < .001.$

Planning for the Future

The penultimate section of the survey addressed senior residents' priorities concerning their future. The first item in this section inquired, "How interested are you in planning for your older years in general?" Response options ranged from "very interested" to "not at all interested." Thirteen respondents declined to provide a response to the question. A little more than half ($n = 326$, 51.1%) of those who did reported being "very interested" in planning for their older years, while 32.4% ($n = 207$) reported being "somewhat interested." Slightly more than one in ten respondents ($n = 75$, 11.5%) indicated they were "neither interested nor disinterested" in planning for their older years. Finally, fourteen respondents ($n = 14$, 2.1%) are reportedly "not interested" in this type of planning and another 16 (2.5%) are "not at all interested." It appears that amongst senior residents surveyed, interest in planning for ones' older years is high.

Looking at plans to age in place, 84.2% ($n = 529$) of respondents expressed plans to live in their same residence as they get older. Ninety nine respondents (15.7%), however, indicated that they did not plan to do so. Of these 99, the most common reasons were finances (e.g. Laguna Beach is too expensive; $n = 39$, 40%) and the presence of stairs ($n = 34$, 34%). Other reasons included the desire to downsize or live in a smaller home, a desire to move close to children or family, a feeling that Laguna Beach was "too crowded" or "too much work," and having to move/relocate when leases expire. A larger proportion of older seniors ($n = 408$, 87.2%) planned to live in the same house than did younger seniors ($n = 103$, 76.3%)¹⁷. The distribution of responses geographically is presented in Map 2. As shown, the distribution of responses in near identical with the exception of tract .0626.49 where 100.0% of respondents indicate a desire to age in place. It should be noted that this tract also produced the smallest number of survey completions, so estimates obtained from this tract might be less reliable than those obtained from other tracts. That being said, the overall percentage of respondents intending to age in place is still remarkably high.

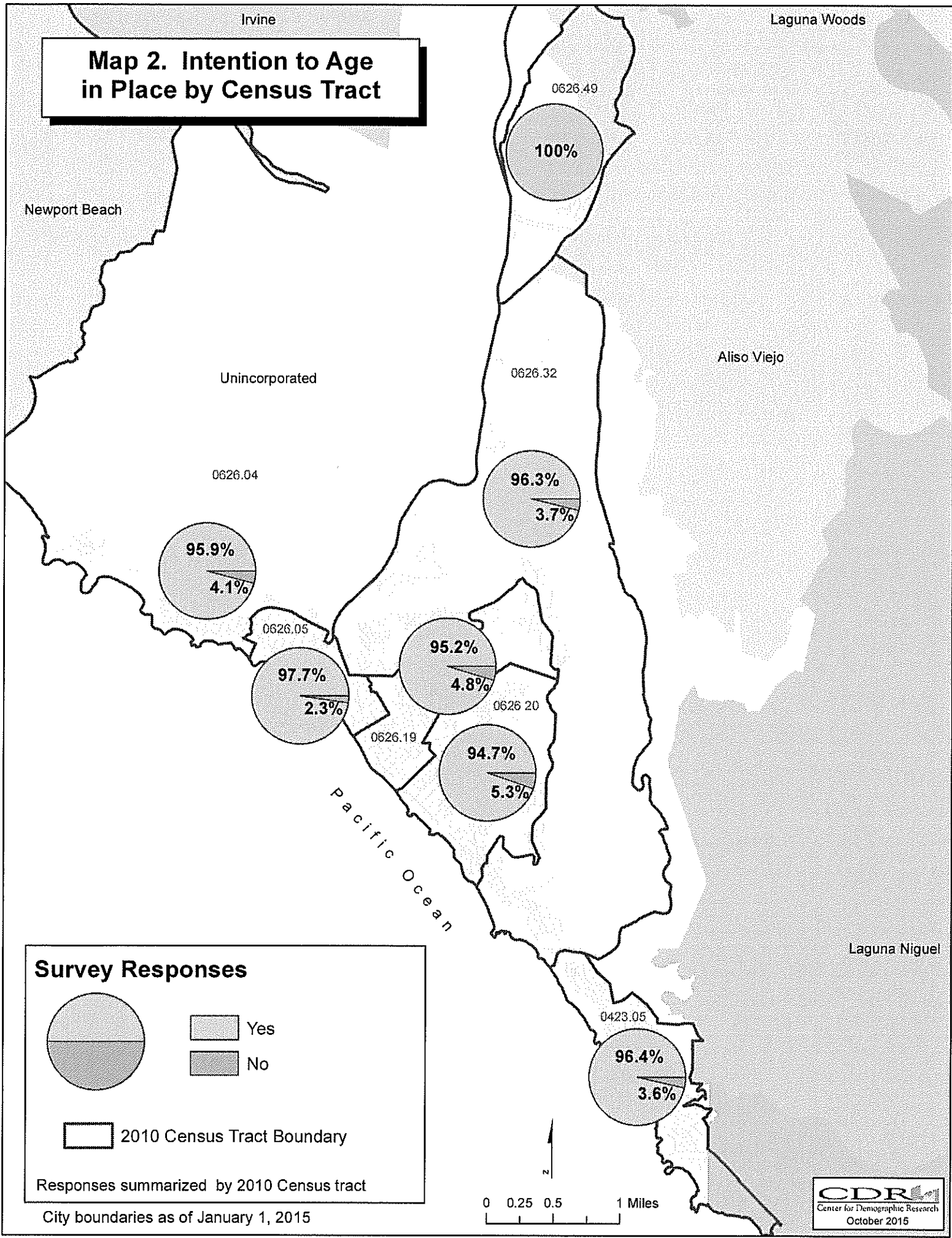
Another survey item addressed plans to remain in the City of Laguna Beach as respondents got older. Nearly nine in ten ($n = 569$, 89.0%) respondents planned on remaining in Laguna Beach during their older years. Of the 59 (9.4%) *not* planning to stay in Laguna Beach, the most common reason was that living in the City of Laguna Beach is too expensive ($n = 40$, 67.8%). Again, a larger proportion of older seniors ($n = 431$, 92.5 %) planned to stay in Laguna Beach than did younger seniors ($n = 118$, 86.1%)¹⁸.

Respondents rated the priority they placed on remaining social and healthy in their older years on a scale from one to five, with 1= "Not a priority at all," and 5 = "A very high priority." As illustrated in Figure 9, the largest proportion of respondents indicated that remaining social in their older years was "a high priority" ($n = 266$;

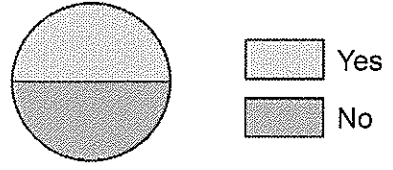
¹⁷ $\chi^2(1) = 8.78$, $p < .05$.

¹⁸ $\chi^2(1) = 4.49$, $p < .05$.

Map 2. Intention to Age in Place by Census Tract



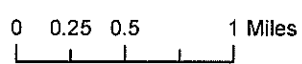
Survey Responses



2010 Census Tract Boundary

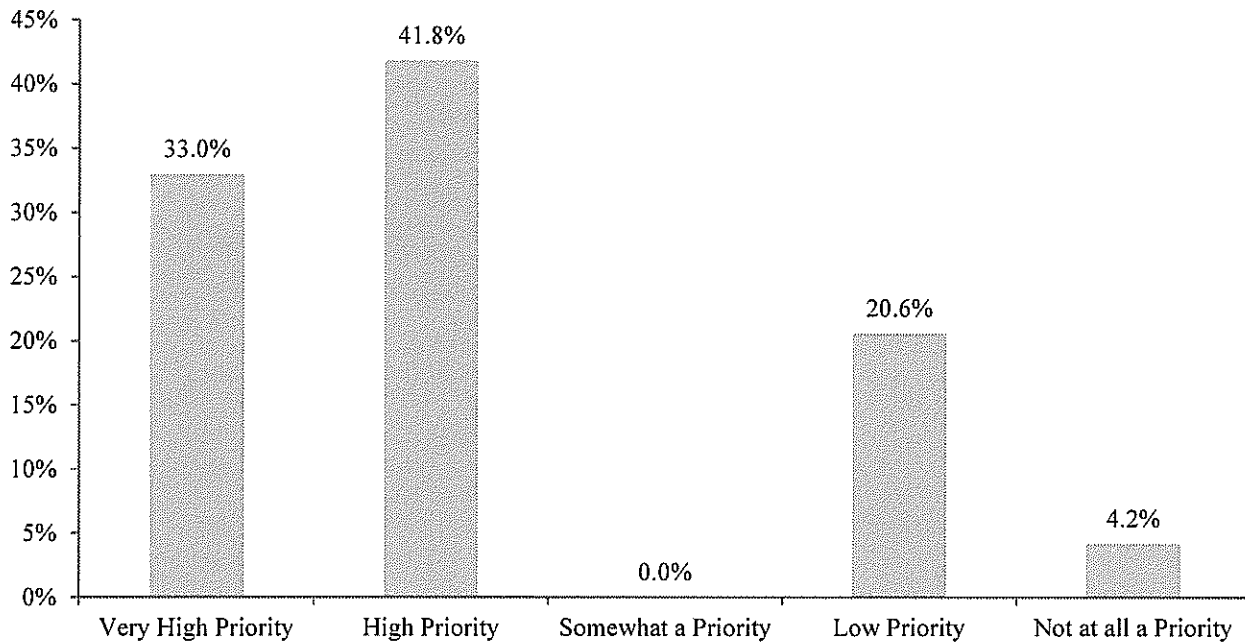
Responses summarized by 2010 Census tract

City boundaries as of January 1, 2015



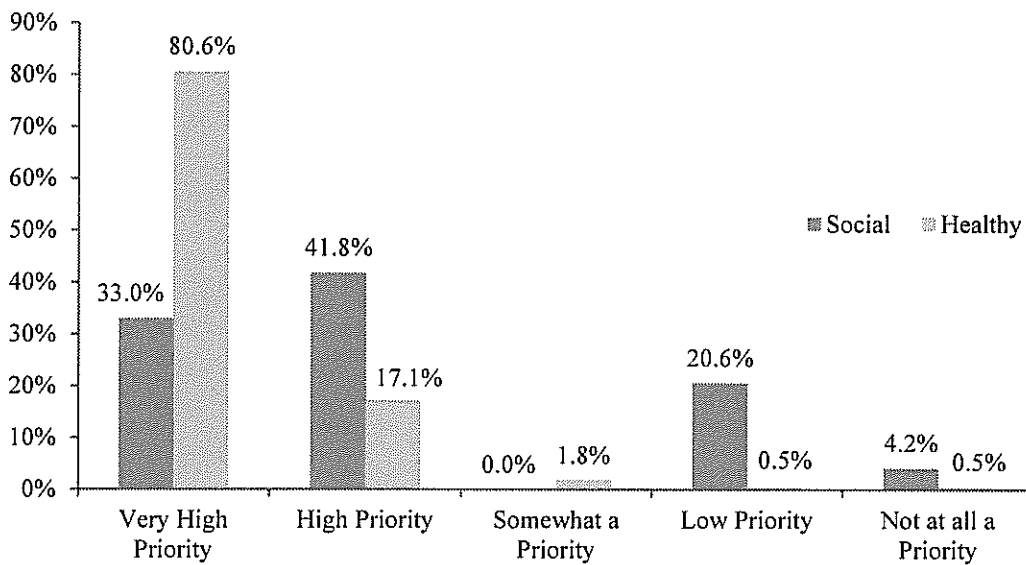
41.8%), followed by the next largest proportion ($n = 210$; 33.0%) who felt it was “a very high priority.” Only three respondents (<1.0%) reported this goal to be “somewhat a priority”; however, nearly one quarter of respondents felt it to be “a low priority” ($n = 131$; 20.6%) or “not a priority at all” ($n = 27$; 4.2%).

Figure 9: Priority of Remaining Social as Respondents Get Older



Remaining healthy while getting older was a greater priority for survey respondents. As shown in Figure10, a greater proportion of respondents ($n = 522$; 80.6%) rated staying healthy a “very high priority” compared to being social. Conversely, while approximately a quarter of survey respondents did not prioritize remaining social during their older years, only 1% felt the same with respect to remaining healthy.

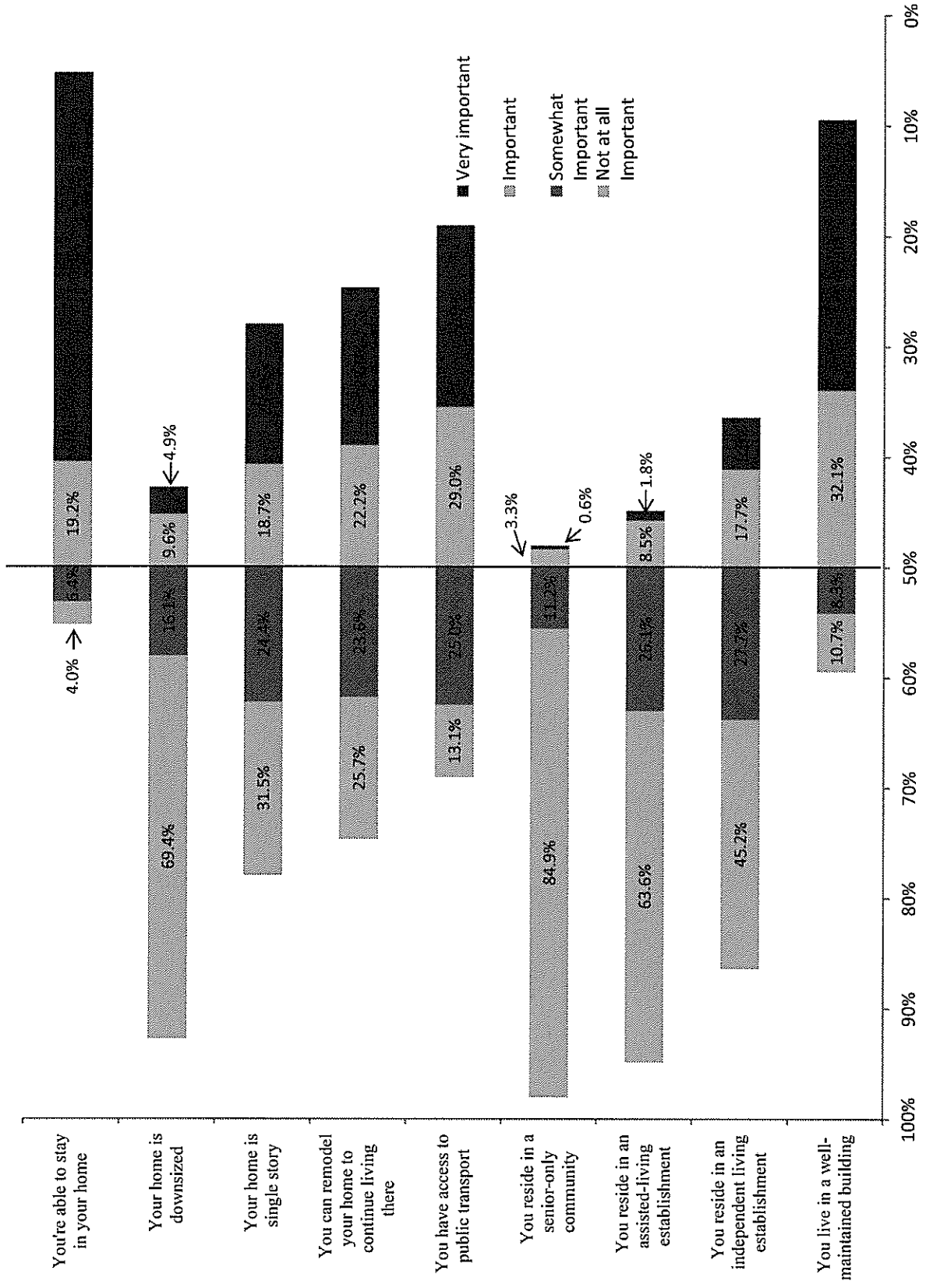
Figure 10. Priority of Remaining Healthy (Relative to Remaining Social) as Respondents Get Older



The next item on the survey instrument inquired, “How interested are you in ensuring that all older adults in Laguna Beach are able to stay healthy, involved, and in their Laguna Beach Residence.” Response options ranged from 1 = “Not at all interested,” to 5 = “Very interested. All but nine survey completers responded to this question. The majority of survey respondents ($n = 388$; 60.4%) indicated being “very interested” in this topic. The next largest proportion ($n = 161$; 25.0%) reported being at least “somewhat interested.” Seventy six respondents (11.8%) are neither interested nor disinterested in this topic, while seventeen (2.6%) are “not interested” ($n = 9$; 1.4%) or “not at all interested” ($n = 8$; 1.2%). Sense of community is strong amongst respondents in that the majority cares about the health and community of fellow senior residents.

Asked again to think about their older years, respondents rated the importance of nine housing conditions on a scale from one to four, where 1 = “Not at all important,” to 4 = “Very important.” Figure 11 depicts the importance ratings for all nine conditions side by side for ease of comparison. As shown, aging in place is viewed as being the most important of the nine conditions for survey respondents, followed by residing in a well maintained building. Having access to public transportation, being able to remodel ones’ home to continue living there, and having a home that is single story, are the third, fourth, and fifth most important considerations survey respondents make when assessing their future housing needs. Fourteen and a half percent of respondents view it as at least somewhat important that they be able to downsize their home, and one in ten place some importance on living in an assisted living establishment. Finally, little importance is placed on living in a senior-only community.

Figure 11: Rate the Importance of Housing Needs



Lifelong Laguna

One of the final items on the survey inquired, “If the City instituted an incentive program with reduced fees, would you be interested in adapting your home to be senior friendly with improvements such as walk-in bath tubs, safety grab-bars, chair lifts for stairs, or other improvements to assist aging in place? Of the 600 respondents who provided an answer, 61.2% ($n = 367$) responded in the affirmative.

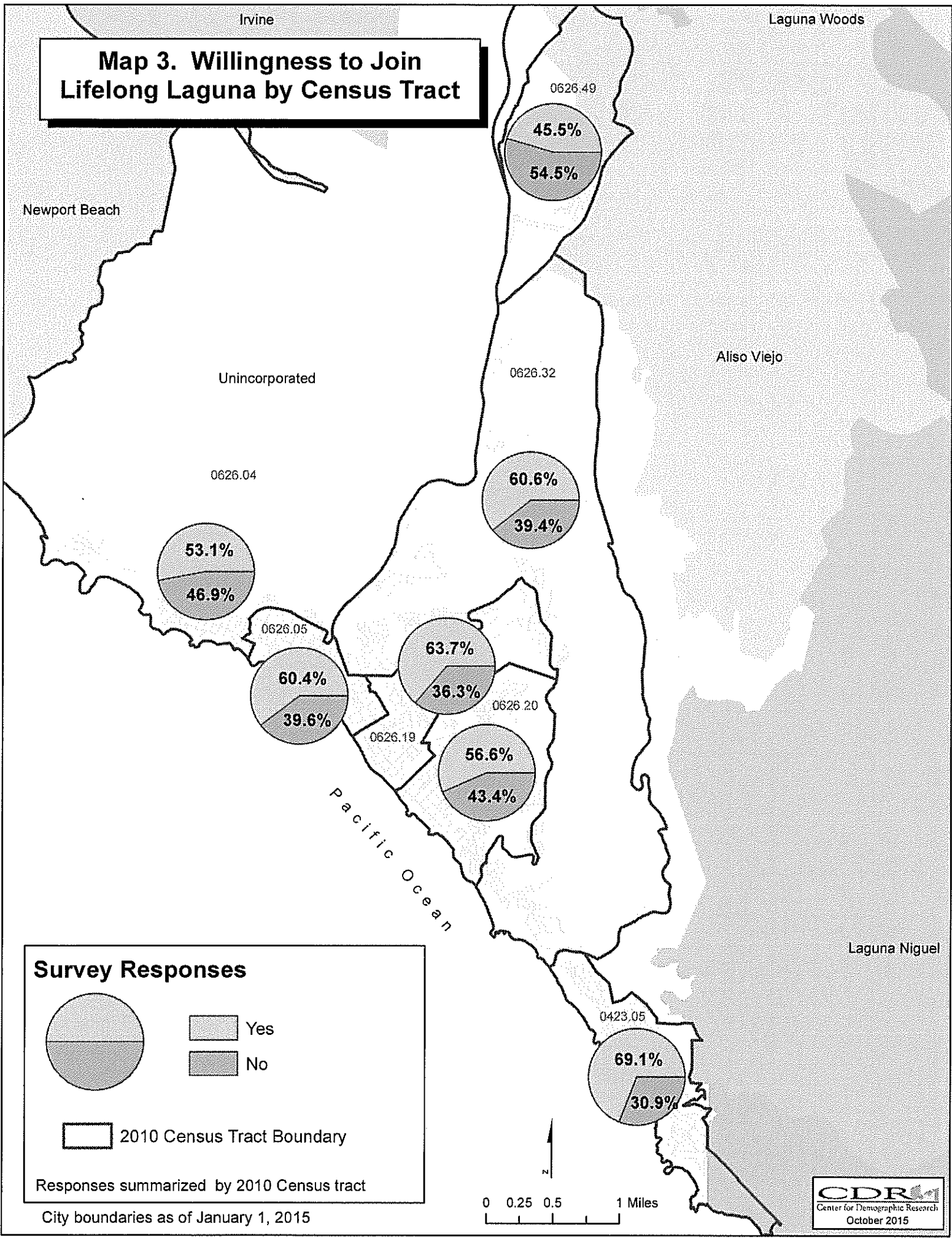
The next section of the survey read:

“A Virtual Village is principally a volunteer-based program that reaches out to Senior Citizens that would like to remain independent for as long as possible and remain in their home, or ‘age in place.’ In essence, the ‘village’ would provide services that are typically provided in Assisted Living or Independent Living facilities, but provide them to you in your own home. Services such as transportation, handyman referral, social interaction, medication management and more would be provided. Volunteers could also ‘bank’ their hours so they can use those hours for services in the future.” If established, would you be willing to join the Lifelong Laguna Village for a fee based on the level of service you request.”

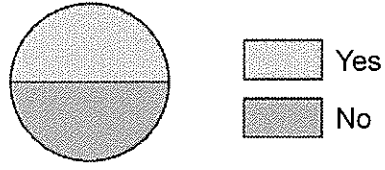
Fifty eight of respondents in the sample (9.0%) declined to provide a response. Of those who answered, the majority answered in the affirmative ($n = 363$; 61.2%), while 230 (38.8%) reported they would not be willing to join Lifelong Laguna Village. The geographic distribution of responses is depicted in Map 3. As shown respondents in the southernmost part of the city appear to be most interested in joining Lifelong Laguna, while those in the northwest part of the city are least interested.

The 363 respondents who reported they would be willing to join the Lifelong Laguna Village for a fee based on the level of service needed indicated the most they would be willing to pay for this membership/service per month. Seventy one respondents declined to provide a response to this question leaving a sample size of 292 for this analysis. As shown in Figure 12, the largest proportion of survey respondents ($n = 79$; 27.1%) indicate they would pay at most \$100 per month to be a member of Lifelong Laguna Village. Interestingly the distribution of responses to this item breaks into two halves around the response option of \$100 per month. Half of the distribution falls at the \$75 per month or less mark, while the other half falls at the \$250 or more mark. Thus, percentage breakdown in Figure 12 reveals that respondents interested in Lifelong Laguna can be classified into two groups. There are those who are willing to spend an amount per month that runs on the higher side i.e. at least \$100 a month. On the other hand, there are those who are not willing to spend a lot and would prefer \$50 a month or less. Future studies should address differences between these two groups, specifically why the latter group is not willing to spend above a certain amount.

Map 3. Willingness to Join Lifelong Laguna by Census Tract



Survey Responses



2010 Census Tract Boundary

Responses summarized by 2010 Census tract

City boundaries as of January 1, 2015

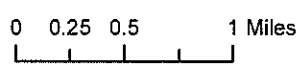
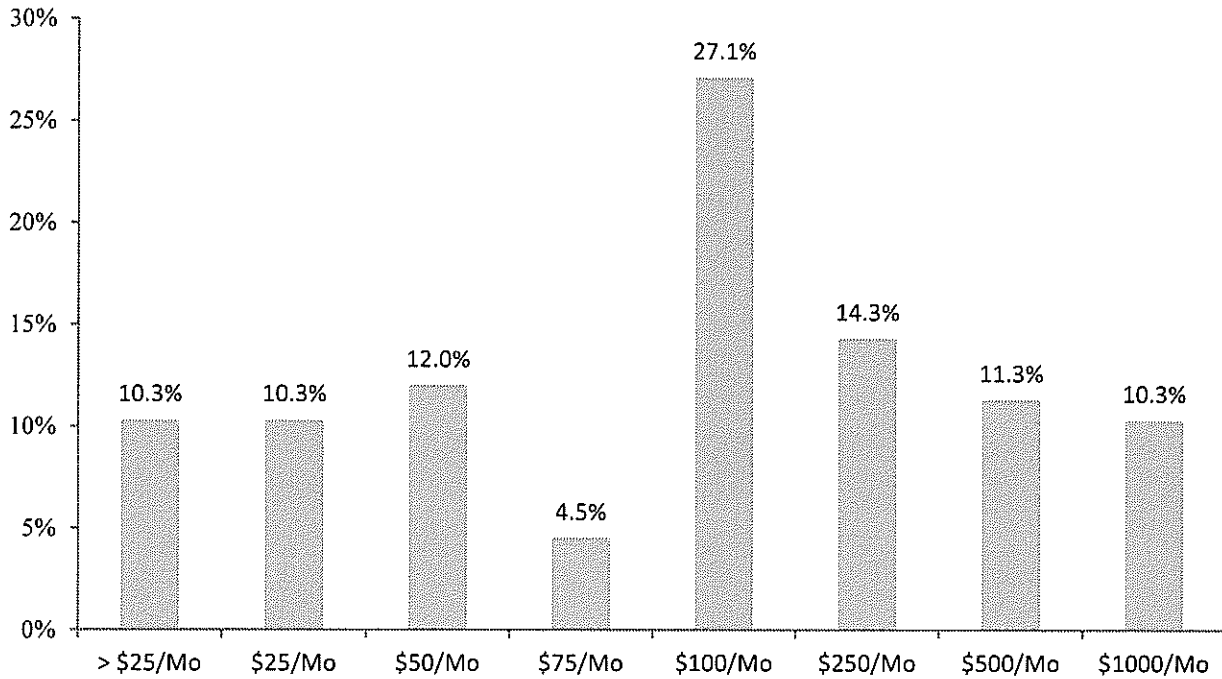


Figure 12: The Most Respondent Would Pay for Lifelong Laguna Village

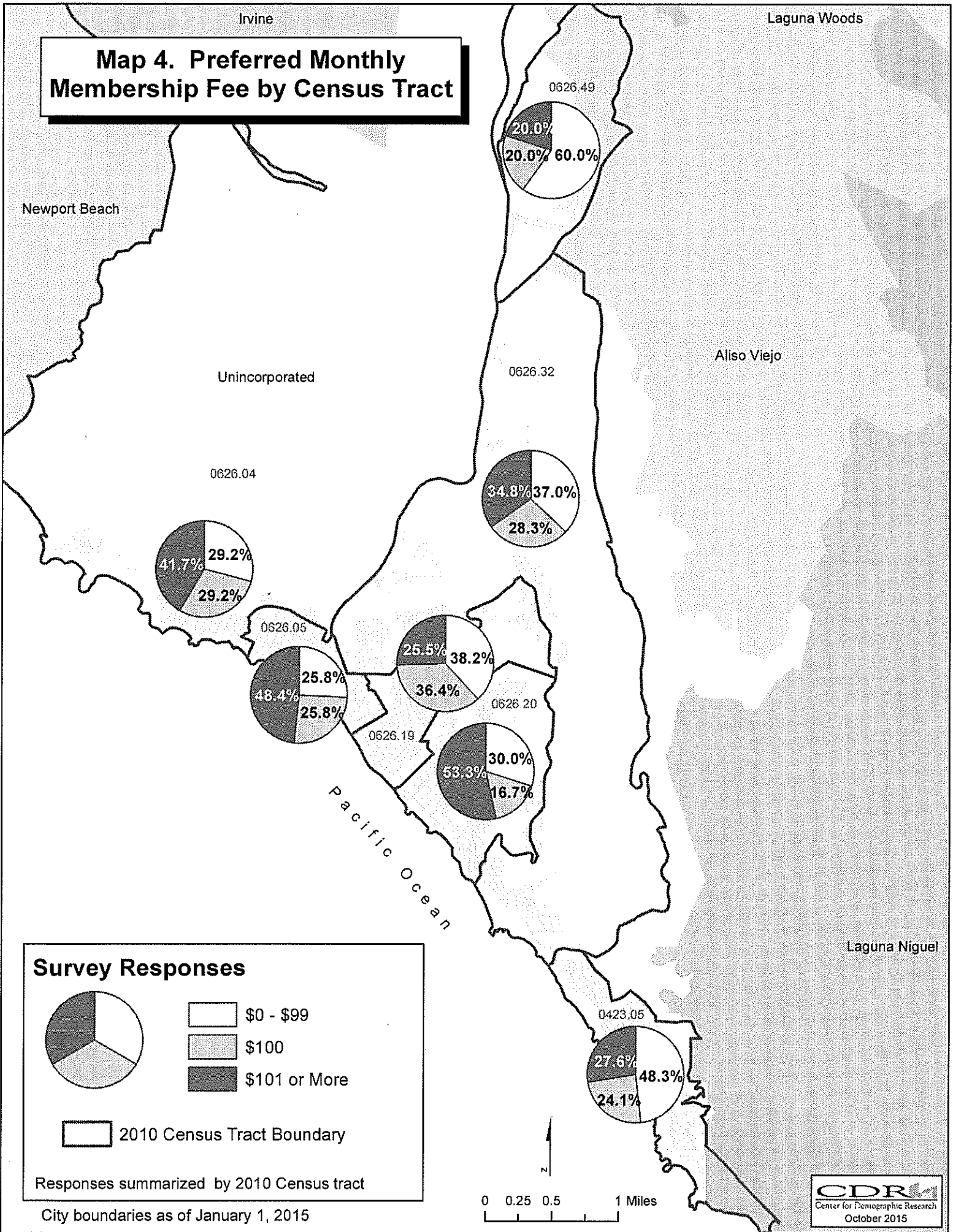


The geographic distribution of responses is presented in Map 4, which shows that respondents residing in the southernmost part of the City would be least likely to spend more than \$100 per month to belong to Lifelong Laguna. The percentage of residents willing to spend more than \$100 per month to be Lifelong Laguna members is almost double that in tract 0626.20.

Personal annual income is related to how much respondents are willing to pay in monthly fees to be a Lifelong Laguna member. Of the 30 respondents who make less than \$25,000 a year, but are interested in being members of Lifelong Laguna, the largest proportion (46.6%) would be willing to \$25/month and none were willing to lay more than \$100/month. Conversely, of the 47 respondents who earned more than \$200,000 per year, the largest proportion (29.7%) would be pay \$100/month to be a Lifelong Laguna member, and another 23 (48.9%) would pay more than \$100/month. These results suggest that Lifelong Laguna membership fees be based on a sliding scale proportional to annual personal/household income.

It should be kept in mind that Lifelong Laguna Village (and the services it will offer) is still an abstract concept, especially as it was presented to respondents in the survey. The lack of details on its exact services may have hampered possible interest and diminished what respondents reported they were willing to pay for membership. The lack of details may also have contributed to the low proportion of responses to the question addressing

Map 4. Preferred Monthly Membership Fee by Census Tract



membership fees. Since details of the services that make up Lifelong Laguna (e.g. quality, diversity, affordability) are such important factors in determining how much they're worth (when paying a membership fee), respondents may not have felt comfortable giving an answer without the details necessary to make an informed decision. As the Lifelong Laguna concept is fleshed out and developed in conjunction with the desires and needs of Laguna Beach seniors, it is reasonable to predict that the interest and support of the senior resident community in Lifelong Laguna will increase to levels greater than those found in this survey.

APPENDIX A

METHOD

Sample Selection

The target population for the current study consisted of all senior residents of Laguna Beach. The two key criteria used to delimit the target population from the general Laguna Beach population were age and address. A resident was classified as a senior citizen resident if he or she was 55 years of age or older. Residency was determined by the 92651 zip code of Laguna Beach.

To reach the target population, the SSRC contracted with Marketing Systems Group (MSG), one of the premier vendors of statistically sound address-based samples, to obtain a list of mailing addresses with a high probability of meeting the eligibility criteria for the current study. This list was drawn from a commercial database that obtains names and phone numbers from various sources. This list of addresses served as the sample frame for the current study. It is important to note that the sample frame contained residential addresses that were mainly associated with listed telephone numbers. Therefore, adults over the age of 54 who are not listed in the white pages are not well represented in the current study.

The sample frame contained the full name, telephone, address, and age for 4,945 individuals who were thought to be residents of Laguna Beach over the age of 54. Once the list was received, the SSRC removed all individuals with non-92651 zip codes from the sample frame leaving 3,074 individuals. Duplicate records (e.g. an owner of multiple households in Laguna Beach) and P.O. boxes were removed leaving a final sample frame of 2,977 residential addresses.

Survey Instrument Design

The survey instrument was drafted by the SSRC in collaboration with SHTF, and contained items considered vital to assessing the housing needs of senior residents. More specifically, items addressing the demographic characteristics and financial well-being of survey respondents as well as residential and household characteristics, activities of daily living, use of services, plans to age in place, and attitudes toward Lifelong Laguna were contained in the survey instrument. The SSRC then validated and refined the instrument for comprehensiveness, flow, length, and other factors that influence respondent cooperation and interest. Finally, the survey was formatted for administration through the mail.

To accommodate possible issues of compromised vision amongst those in the sample, large print, wide spacing, and white space were used in creating the mailing format for the survey. However, attempts to maximize readability were constrained by the length of the survey. A high page number would mean increased printing and mailing costs as well as increased potential for survey recipients to ignore the survey. A survey that appears

lengthy is considered time-consuming. Striking a balance, the end result for the mailing format was a 20 page (4.25" by 5.5") booklet with one inch margins, double spacing, and font sizes no smaller than 17.

When respondents were done filling out the survey, they could flip the booklet inside out, revealing the SSRC's address and a barcode that the US Postal Service could scan in place of paid postage. The inside out booklet could then be sealed together with mailing tabs provided with the survey and dropped into a mailbox to be returned to the SSRC.

The survey was 53 questions long, containing dichotomous, Likert, multiple choice, and free response formats. Time to complete the survey was estimated to be between 10 to 15 minutes. The survey instrument in its form prior to being formatted for mailing is provided in Appendix B; formatting for administration in the mail did not entail any changes to the content of the survey.

Data Collection

Residents of Laguna Beach were notified of the survey through the local newspaper, the *Laguna Beach Indy*. The issue published on July 3, 2015 contained an article entitled *Survey Assesses Housing Needs of Seniors* which described the purpose of the survey and quoted the chair of the SHTF, who implored senior residents to complete the survey. In addition, the SHTF commissioned a local company to produce and mail a notification letter to senior residents who would later receive the survey itself. These letters were mailed on July 2.

On July 14, the SSRC mailed out 2,977 surveys to the individuals contained in the same frame.¹⁹ The surveys were designed to be filled out and simply dropped into a mailbox to be returned to the SSRC, no postage necessary. This return-mailing process required a special set up with the US Postal service in order to prepay the return postage for the surveys. This special mailing process extended the time between when the surveys were mailed back to the SSRC and when the SSRC actually received the surveys. It took anywhere from one to two weeks for the SSRC to receive a survey once the respondent mailed it back. From July 24 to August 25, the SSRC received 662 surveys.

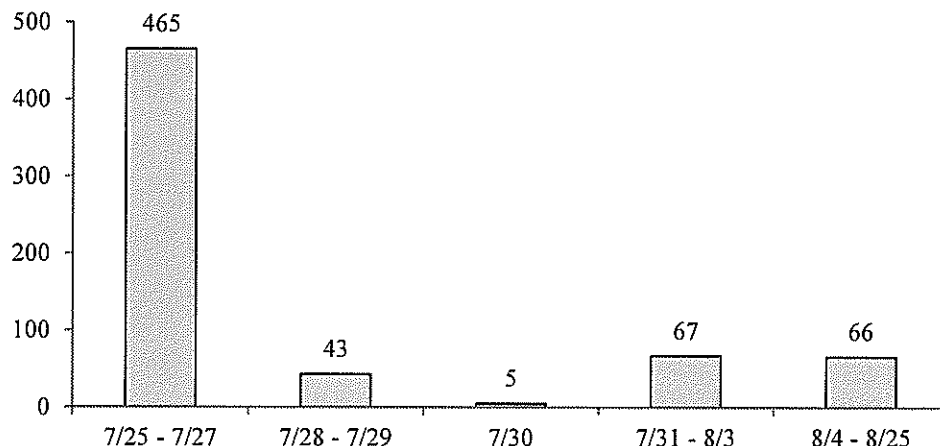
Data Collection Outcomes

Figure A1 shows the rate at which surveys came into the SSRC. The date ranges in the graph are not uniform because the SSRC received batches of surveys from the processing center at irregular intervals. The majority of surveys were received almost two weeks after the surveys were first mailed. The next largest batch came at the "first" deadline to return the survey, which was stated in the survey's introduction as July 30. However, after

¹⁹ An additional 80 surveys were handed out at the Susi Q on July 17 for residents that may have felt left out from the sample because they were not sampled and wanted their voices to be heard.

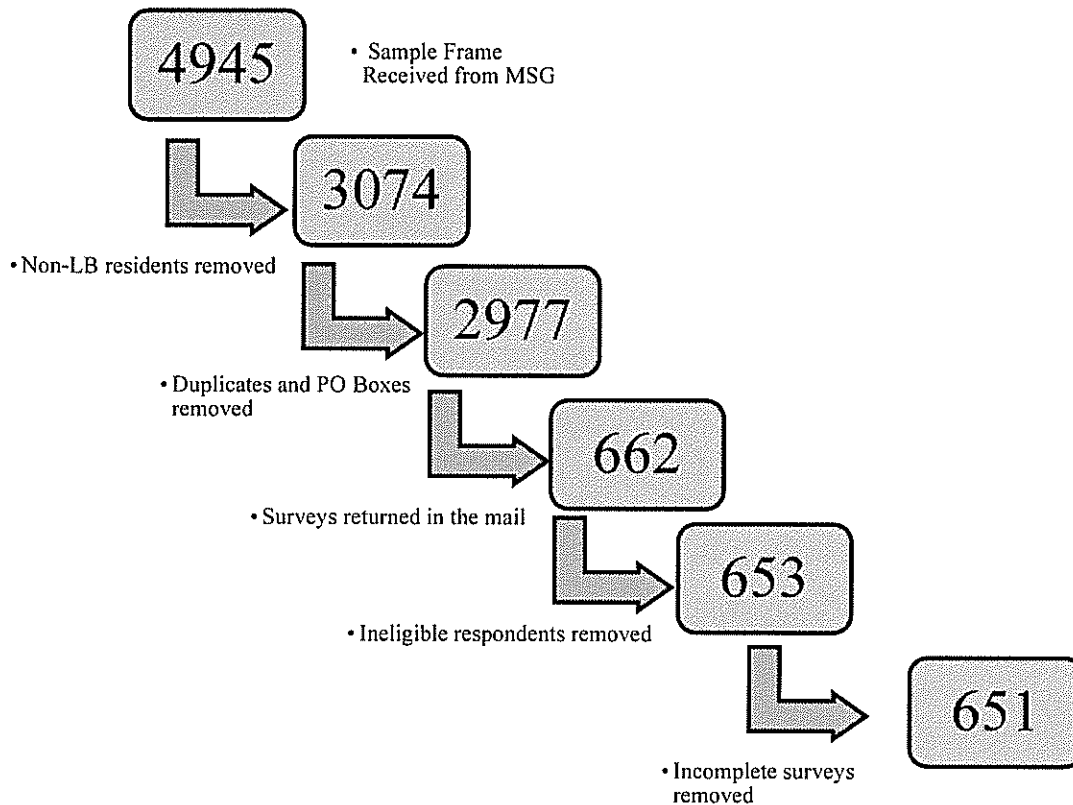
the surveys had been originally mailed out, the SHTF voted for an extension, establishing a “second” deadline of August 10, 2015; respondents were notified by an article in an e-newsletter distributed by Laguna Beach Seniors. Thus the SSRC continued to collect surveys up until August 25, 2015.

Figure A1: Rate of Incoming Surveys



Screening for Eligibility. The 662 returned surveys were screened for completeness and eligibility. Because of imperfections in the sampling frame, people who were ineligible for the study returned surveys (i.e. individuals under the age of 55 and/or living outside of Laguna Beach). Four respondents had the survey forwarded from their Laguna Beach address to another house outside of the city limits. While it is possible that these respondents had more than one house, one of which was in Laguna Beach and the other(s) outside the City boundaries, we made the conservative assumption that these respondents had just recently moved out of Laguna Beach and were no longer eligible for the survey. Another five respondents indicated in their returned surveys that they were 55 years of age or older. Finally, two surveys were considered incompletely filled out (less than 50% of questions answered). A total of 11 surveys were removed resulting in a final sample of 651 eligible individuals. Figure A2 details the entire process from the acquisition of the sample frame from MSG to the final set of surveys that were analyzed.

Figure A2: The Sampling Process



Anonymity. Approximately 15% ($n = 98$) of the received surveys ($N = 651$) were anonymously submitted. For the other 85% ($n = 553$) of surveys, responses could be linked to a specific individual in the sample frame. For the 98 anonymous surveys, identifying information such as the address label had been removed by the respondent, rendering identification impossible. Thus, it is unclear whether the anonymous surveys were from the individuals who were in the sample frame but had wished to remain anonymous, or that the person associated with the address no longer lived there and so it was completed by another eligible respondent.

Dispositions. A disposition is an outcome associated with each of the records in a sample frame. For example, “vacant” is a disposition associated with individuals in the sample frame whose survey was returned with the USPS postal code that indicates vacancy of residence. Table A1 provides a breakdown of the specific dispositions assigned to records in the sample frame. The disposition “Nothing known about respondent or address” was the default used if no survey was received, and no information was available. “Unknown whereabouts” was used for a variety of problems in the mailing process, like vacant houses, undeliverable mail, mismatch between addressee and address, and other similar situations. “Returned with forwarding information” was used for surveys that were returned with a new address for the addressee. The refusal disposition was

reserved for the three that called into the SSRC and explicitly declined to participate in the study.

Table A1: Count of Final Dispositions

Disposition	Count	Percent
Nothing known about respondent or address	2,173	73.0
Complete	541	18.2
Anonymous	98	3.3
Unknown whereabouts	89	3.0
Returned with forwarding information	52	1.7
Partial	10	0.3
Respondent screened out of sample	9	0.3
Refusal	3	0.1
Incomplete	2	0.1
Total	2,977	100.0

Response Rates. The SSRC calculates survey response rates using the American Association for Public Opinion Research (AAPOR) Response Rate Calculation Method 3 (RR3), which estimates how many of the senior residents of Laguna Beach that were classified as having unknown eligibility are in fact eligible (but decided not to return their survey). Eligibility of households for which a survey was not returned is difficult to gauge for mail surveys because it is unknown if the resident was eligible and did not return the questionnaire even though he or she could have (the household was eligible, but the individual declined to participate in the study), or if the resident was ineligible and did not notify the SSRC of this. RR3 splits households for which a survey was not returned into smaller eligible and non-eligible groups allowing a more informative estimate of the true response rate. As a result, the large number of residents who did not return a survey are by default classified as having unknown eligibility.

The RR3 formula is:

$$RR3 = \frac{C}{(C + P) + (R + N) + e(U)}$$

Where C = completed surveys²⁰, P = partially completed surveys, R = incomplete surveys or refusals, N = unavailable respondent, e = estimate of eligibility, U = unknown eligibility.

The Cooperation Rate was also calculated. It is the proportion of senior residents successfully surveyed out of all eligible residents in the sample. The SSRC uses the Cooperation Rate Method 3 (COOP3), which counts all

²⁰ In terms of completeness, returned surveys were classified into one of two groups. Complete surveys had 80% to 100% of questions answered. Partial surveys had 50% to 80% of questions answered. Cutoffs were based on AAPOR recommendations outlined in *Standards Definitions: Final Dispositions of Case Codes and Outcome Rates for Surveys* (2008).

returned surveys of various levels of completion and refusals as eligible.

The COOP3 formula is:

$$COOP3 = \frac{C}{(C + P) + R}$$

The Response Rate for the sample was 19.1%, and the Cooperation Rate was 97.7%. In all, completed surveys comprised 21.5% ($n = 641$) of all surveys mailed out ($N = 2,977$)²¹.

Representativeness of the Sample. In order to generalize the survey results of our sample to the target population of all senior residents in Laguna Beach, it is necessary to make sure our sample is representative of the population. In essence, our sample should be a miniature version of the population of senior residents. There are two methodological limitations that reduce the representativeness of our sample and consequently restrict the generalizability of our results. One is that the sample frame acquired from MSG was not comprehensive – there were eligible residents who were not included in the frame, and so any results found from our sample will not necessarily generalize to them. Second was that survey response rate was minimal. One way of estimating the effect these methodological limitations may have on our results is to compare the demographics of our sample to census data. The demographics will help us estimate the answer to the question “How representative is our sample despite the shortcomings of our sampling method?” Population demographics were taken from the 2010 US Census. Unfortunately, census data is not reported specifically for those 55 years of age or older in Laguna Beach and so the only population demographic available was that of age itself. Table A2 shows the age distribution of those age 55 years and older residing in the City of Laguna Beach compared to that of the survey sample.

Table A2: Age of the Sample and Population

Demographic		Sample	2010 US Census	Discrepancy
Age	55-64	25.8%	50.8%	25.0%
	65-74	42.4%	30.2%	12.1%
	75-84	24.8%	13.3%	11.5%
	>85	7.0%	5.7%	1.3%

As shown in Table A2, the study sample under-represents those senior residents between the ages of 55 and 64 and over-represents those between the ages of 65 and 84. One explanation is that adults between the ages of 55

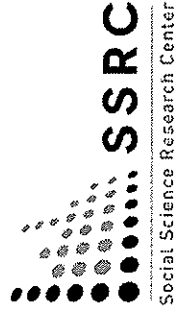
²¹ There is a discrepancy between the response rate and the percent of completed surveys because anonymous surveys were not used in the calculation of the response rates since there was no way to estimate their eligibility.

and 64 do not consider themselves to be senior residents and therefore did not respond – one respondent wrote in her survey “I don’t yet consider myself a senior citizen!” Another possible explanation is that those over the age of 65 have more time (because they are more likely be retired) or the issues addressed in the survey are more pressing to them, making them more inclined to complete and return the survey.

For the purposes of this survey, the difference in representation between age groups is only a concern if these age groups differ in their responses to the survey questions. For each survey question, responses were analyzed for the sample overall and between the two age groups of younger seniors (55-64) and older seniors (65+). Considerable differences are reported in the results section. If for a specific survey question there is no mention of younger versus older seniors, it can be assumed that there were no considerable differences between the two, and it is safe to look at the result for the entire sample.

APPENDIX B
SURVEY INSTRUMENT

Laguna Beach Housing Needs Assessment



The city of Laguna Beach, Senior Housing Task Force would like to assess the current and future needs of residents 55 years and over residing within the city limits. The responses you provide in this survey will be aggregated with the responses of other residents to inform the city of Laguna Beach as to how it can best address the needs of Laguna Beach’s maturing population.

Please complete the survey and return it in the self-addressed envelope by July 30th, 2015. **If you or no one in your household is over the age of 54, mark “no” below and send the survey back using the envelope provide.** If you have any questions regarding the purpose of the study, for example how the data will be used or about the data collection process itself, we have provided contact information at the end of the survey.

Are you over the age of 54?

Yes No [Please stop and return your blank survey]

Feel free to add any additional comments you have about the study in these last few pages.

First, we would like to understand the types of individuals responding to this survey. Some of these questions may seem personal. Remember, all of the data you provide will remain confidential and will not be shared with anyone. The information you provide will not be used to sell you anything at a later point in time.

1. In what year were you born?

2. What is your gender?

Male Female

3. Are you of Hispanic, Latino, or Spanish Origin?

Yes No

4. Which of the following categories best describes your racial/ethnic identification?

White Some other race:

Black or African I prefer not to say.

Asian or Pacific Islander

5. What is your marital status?

Single Widowed

In a domestic partnership I prefer not to say.

Married

6. Which of the following categories best describes your annual income from all sources?

- Less than \$25,000
 \$25,000 - \$49,999
 \$50,000 - \$74,999
 \$75,000 - \$99,999
 \$100,000 - \$149,999
 \$150,000 - \$199,999
 \$200,000 or more
 I prefer not to say.

7. Which of the following is a source of your current annual income? Please check all that apply.

- Income from rental properties
 Annuity
 Trust
 VA Pension
 Military disability
 Social Security
 Public Pension
 401K or other defined benefit
 Employment
 Other, please describe: _____

8. Considering your assets and liabilities, which of the following best describes your net worth?

- Negative or zero
 \$1 - \$4,999
 \$5,000 - \$9,999
 \$10,000 - \$24,999
 \$25,000 - \$49,999
 \$50,000 - \$99,999
 \$100,000 - \$249,999
 \$250,000 - \$499,999
 \$500,000 and over

53. Would you be willing to be contacted directly regarding your answers to this survey?

- No, I prefer to answer this survey anonymously. [Go to end of survey]
 Yes, I want my input heard.

54. Please provide your contact information below so we can reach you. Your contact information will be kept in a secured data file separate from the responses you provided to this survey.

Name: _____
 Telephone Number: _____
 Email Address: _____

This concludes our survey. Thank you very much for your participation!

If you have any questions regarding the purpose of the study, please contact Laura Gil-Trejo at (657) 278-7691. If you have questions about the research process, please contact CSU Fullerton Regulatory Compliance Coordinator at (657) 278-7640 or the Institutional Review Board (IRB) Chair at (657) 278-5062.

50. If the City instituted an incentive program with reduced fees, would you be interested in adapting your home to be "senior friendly" with improvements such as walk-in bathtubs, safety grab-bars, chair lifts for stairs, or other improvements to assist "aging in place"?

Yes No

PLEASE READ: A Virtual Village is principally a volunteer-based program that reaches out to Senior Citizens that would like to remain independent for as long as possible and remain in their home, or "age in place." In essence the "village" would provide services that are typically provided in Assisted Living or Independent Living facilities, but provide them to you in your own home. Services such as transportation, handyman referral, social interaction, medicine management and more would be provided. Volunteers could also "bank" their hours so that they can use those hours for services in the future.

51. If established, would you be willing to join the "Lifelong Laguna Village" for a fee based on the level of service you request?

Yes No [Go to Question 53]

52. What is the most you would pay for this membership/service?

\$1000/month \$75/month
 \$500/month \$50/month
 \$250/month \$25/month
 \$100/month Less than \$25/month

The next few questions address your residence, including members of your household.

9. How many years have you lived in Laguna Beach? _____

10. Do you own or rent the place you reside in?

Own Rent

11. Which of the following best describes your residence?

Single family dwelling Motor home
 Condominium or Townhome Other, specify: _____
 Apartment

12. Do you have to climb stairs to get into your home or to move between rooms inside your room? For example, to go from your kitchen or living room to your bedroom.

No
 Yes, I have to climb stairs to get into our home.
 Yes, I have to climb stairs to move between rooms inside our home.
 Yes, I have to climb stairs to get into our home AND move between rooms in our home.

13. Not including yourself, how many people live in your household? _____

I live alone [Go to Question 16]

14. For each of the following categories of people, tell us how many live in your household. For example, if you live with one adult child and no one else, indicate 1 next to **Adult children**, and 0 next to all other groups of people.

___ Spouse ___ Friend
 ___ Adult children ___ Roommate
 ___ Grandchildren ___ Other, specify: _____
 ___ Other family _____

15. Are you responsible for the care of another person in your household?

Yes No [Go to Question 16]

15a. Not including yourself, how many people do you care for in your household?

15b. For each of the following categories of people, tell us how many you care for. For example, if you care for a child indicate "1" next to "Child." If you do not care for anyone in the remaining categories of people, indicate "0" next to that category.

___ Spouse ___ Friend
 ___ Adult children ___ Roommate
 ___ Grandchildren ___ Other, specify: _____
 ___ Other family _____

16. Do you have a caretaker that either lives or works in your home?

- Yes, a caretaker lives in our home.
 Yes, a caretaker works in our home but does not live in our home.
 No, a caretaker neither works nor lives in our home. [Go to Question 18]

49. Think about housing needs you may have during your older years and rate the importance of each of the following:

Very Important Important Somewhat Important Not at all Important

- a) That you be able to stay in your own home (the home you live in now).
- b) That your house be downsized.
- c) That your place of residence is single story.
- d) That you are able to remodel your home so you can continue to live there throughout your older years (e.g. walk-in tubs, rails, ramps, etc.).
- e) That you live in a place where you have easy access to public transportation options.
- f) That you reside in a senior-only community.
- g) That you live in an assisted-living establishment with personal care and meals.
- h) That you live in an independent living establishment with some services.
- i) That you live in a building that is maintained well.

46. Thinking about your older years, how much of a priority is it for you to be social? Remember, "older years" refers to 10 or more years into the future.

- A very high priority
 A high priority
 A low priority
 Not a priority at all

47. Thinking about your older years, how much of a priority do you feel it is for you to stay healthy?

- A very high priority
 A high priority
 Somewhat of a priority
 A low priority
 Not a priority at all

48. How interested are you in ensuring that older adults in Laguna Beach are able to stay healthy, involved and in their Laguna residence?

- Very interested
 Somewhat interested
 Neither interested nor disinterested
 Not interested
 Not at all interested

17. For whom was this person hired for?

- Myself.
 My spouse/domestic partner.
 Other member of my household. Please specify this person's relationship to you: _____

The next few questions address other areas of daily living such as transportation and service use.

18. Do you drive your own car?

- Yes No

19. Do you use public transit services such as the "Blue Bus," Trolley, Sally's Fund, or other transportation services (for example, UBER, hired driver, etc.)?

- Yes No

20. In an average week, how often do you leave your home for activities/chores/errands?

- Multiple times a day 2 - 3 times a week
 Daily Never
 4 - 6 times a week

21. Do you use outside services such as house cleaning, handyman, or home repairs you hire?

- Yes No

22. Do you use a referral service for handyman related jobs? For example, plumbing, light carpentry, electrical, etc.

Yes No

23. How often do you volunteer in the community?

Not at all [Go to Question 25] Somewhat often
 Not that often Very often

24. When you do volunteer, what types of activities are you doing?

25. Do you participate in activities/use services at the Laguna Beach Senior Facility (Susi Q)?

Yes No [Go to Question 28]

26. What types of services do you use?

27. What types of activities do you participate in?

44. Do you plan on living in your same house during your older years?

Yes [Go to Question 45] No

44a. Why don't you plan on living in the same house during your older years?

45. Do you plan on remaining in Laguna Beach during your older years?

Yes [Go to Question 46] No

45a. Why don't you plan on living in Laguna Beach during your older years?

41. For what reason do you access the internet? Check all that apply.

- For entertainment (play games, watch movies, read books, etc.)
- To get the news
- To find
- To communicate with others (via email/social media/skype/etc.)
- To work
- To conduct my banking
- Some other reason: _____

42. What type of device do you use to access the internet? Check all that apply.

- A laptop or desktop computer
- A smartphone
- A tablet (e.g. an iPad)
- Some other way: _____

The next few questions address what your housing situation might look like during your older years. For the purpose of this survey, "older years" means 10 or more years into the future.

43. How interested are you in planning for your older years in general?

- Very interested
- Somewhat interested
- Neither interested nor disinterested
- Not interested
- Not at all interested

28. Which of the following limits your involvement with the Senior Center (Susi Q)? Check all that apply.

- Health, disability, mobility concerns
- Not enough time
- Transportation problems
- Caregiver responsibilities
- Financial issues
- Job responsibilities
- Age, old age, too old, too tired
- Busy with personal interests
- Don't know about opportunities
- Live too far from Center
- People of a different political persuasion are in control
- Have other sources of involvement with faith-based organizations
- Involved with family, friends, etc. instead
- Other, specify: _____

29. Which of the following senior services provided by the City do you use? Check all that apply.

- Sally's Fund
- Meals on Wheels
- Laguna Beach Seniors Care Management Program
- Classes, workshops or presentations specifically geared for seniors.
- Support groups such as Feeling the Blues, Coffee Talk, Grief

30. What other Senior Services do you use? Check all that apply.

- Home Care Services such as bath services, housekeeping, meal preparation.
- Visiting Angels or other caregiver service organizations
- Other, please describe: _____

31. Which of the following medical services do you currently use?

Check all that apply.

- Urgent care
- Prescription delivery
- Medication managements
- Other. Please describe: _____

32. In what city does your primary physician operate? Please spell out the full name of the city. _____

33. When or if hospitalized, at what hospital do you seek emergency or medical assistance? Please spell out the full name of the hospital. _____

Questions 34-39:

	Yes	No
34. Do you feel like you have enough information about the types of services available to you?	<input type="checkbox"/>	<input type="checkbox"/>
[Go to Question 36]		
35. Do you feel you have enough information on how to access these services?	<input type="checkbox"/>	<input type="checkbox"/>
36. Do you feel you have enough information about the programs and health and educational services offered by Laguna Beach Senior Center (Susi Q)?	<input type="checkbox"/>	<input type="checkbox"/>
37. Have you personally been the victim of fraud or identity theft?	<input type="checkbox"/>	<input type="checkbox"/>
38. Does your household have an Emergency Preparedness Plan?	<input type="checkbox"/>	<input type="checkbox"/>
39. Do you have access to the internet in your residence?	<input type="checkbox"/>	<input type="checkbox"/>
[Go to Question 43]		

40. How often do you access the internet during an average week?

- Not at all [Go to Question 43]
- Not that often
- Somewhat often
- Very often