

## Staff Report

November 10, 2009

**TO:** Social Services Commission (for November 16, 2009 meeting)  
Senior Citizen Commission (for November 19, 2009 meeting)

**FROM:** Bob Wolcott, Principal Planner, Community Development Department  
Danielle Foster, Housing Programs Manager  
Katherine Hess, Community Development Director

**SUBJECT:** Draft Senior Housing Strategies

---

### **Staff Recommendation**

Staff requests the Senior Citizen Commission and Social Services Commission provide recommendations on the attached draft resolution of senior housing strategies. Staff will attempt to incorporate the recommendations into the draft resolution and will forward the recommendations to City Council for their consideration on December 8, 2009.

*Staff recommends that the commissions utilize the one-page summary of the strategies on the fourth page of the draft resolution (which is the first page of Exhibit A, Senior Housing Strategies).*

### **Project Background**

On June 2, 2009, the City Council received and approved a residential development status report. As part of their motions, the Council directed staff (by a 3-2 vote) to proceed with a "Strategy for Housing Seniors in Davis" based on the premise put before Council, with the addition of the following points:

***Preliminary objectives.*** *Develop a strategy for housing seniors through 2013 and beyond.*

*Evaluate issues including:*

- *Community needs*
- *Interest levels of seniors*
- *Senior housing share of the growth cap.*
- *Suitability of potential infill and peripheral sites.*

***Preliminary approach.*** *Develop work program. Build upon the work already started by the Senior Citizen Commission and Social Services Commission, (in the) "Guidelines for Housing that Serves Seniors and Persons with Disabilities" intended to assist in the review of applications for senior housing projects.*

*Consider costs beyond staff time. Could involve data collection, analysis and determining interest levels. Consider funding source alternatives. Include in the data for analysis the data already collected by “Choices for Healthy Aging”, not excluding other data.*

*The time frame is to deliver the strategy to City Council by December 31, 2009.*

The City Council decided to suspend a committee process to develop the senior housing strategy. This was done in conjunction with a re-evaluation by the City administration of workloads and staffing commitments. Instead of a committee process, staff is taking policy options and recommendations to the Senior Citizen and Social Services commissions with this report. Staff will present the commission recommendations and public comments to Council as they make decisions.

The City Council decided to not conduct a sample survey of Davis seniors regarding their plans, preferences, concerns and needs related housing. Reasons included the costs, schedule impact, and questionable benefit. Staff has reviewed other available national, regional and local surveys to supplement demographic data gathered by Bay Area Economics (BAE) for this project.

### **Background Data**

**“Senior Population and Housing Data and Projections, 2007 – 2030”**. Staff has utilized the services of Bay Area Economics to provide senior population and housing data and projections to inform the Senior Housing Strategy project. The attached report contains:

- A summary of key assumptions and limitations.
- Projections of senior population and households.
- Profile of senior household incomes.
- Profile of senior housing choices.
- A summary of the methodology.

The commissions previously received version of the report dated September 27, 2009. Attached to this report is an updated version dated November 3, 2009 based on new “American Community Survey” data released by the Census Bureau on October 27, 2009.

Highlights from the report include:

- Without an assumed 1% growth rate, the 55+ age group in Davis is projected to grow by 3,815 persons from 2010 to 2030 simply by the aging of the population.
- With an assumed 1% growth rate, the population of the 55+ age group in Davis is projected to grow by 7,913 persons from 2010 to 2030. The percentage of the 55+ age group would increase from 17% to 24% of the total population. *See Figure 3 on the next page.*

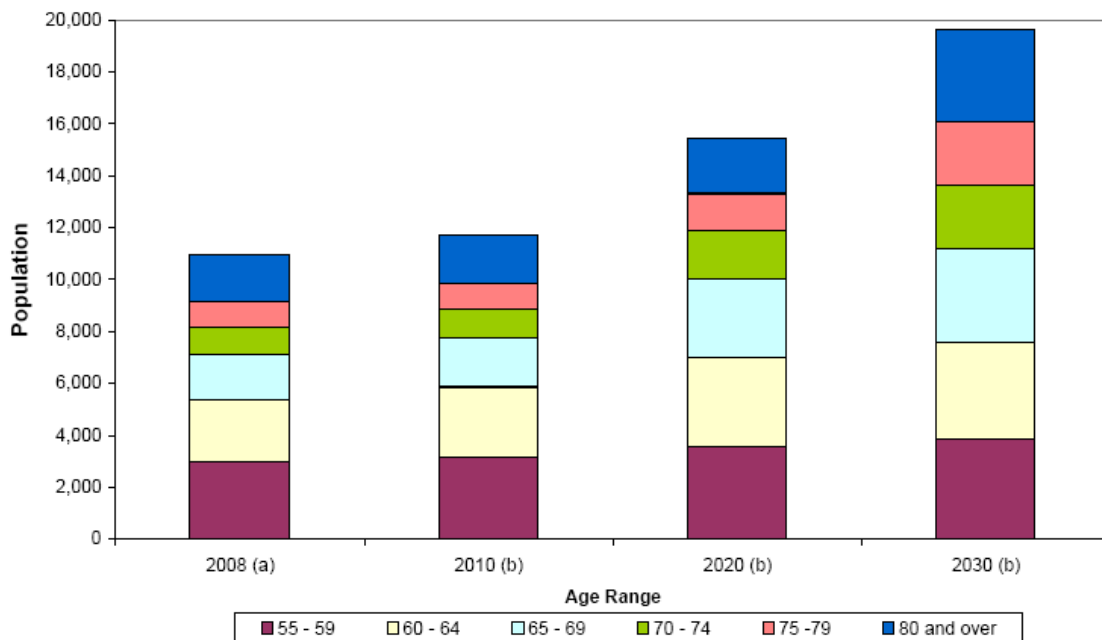
One of the assumptions used in the projections is that the student population between ages 18 to 24 is held to 2008 throughout the projections. All students are assumed to be in the Under 55 category. This assumption was used because the UC Davis Long Range Development Plan (LRDP) projects there will be a negligible change in the number of students residing in the city

and absent UC Davis plans for growth beyond the current LRDP, the campus is assumed to stabilize after 2015-16.

Based on national estimates for households ages 65+ from the “American Seniors Housing Association,” approximately 15% live in age-restricted senior housing of the following types: continuing care retirement communities; independent living; market rate assisted living; subsidized senior apartments; market rate senior apartments with no services; and active adult residences. These terms are defined in Strategy 2 of the attached resolution.

Age-restricted housing requires the units to be occupied by persons of a specified age (such as 55 years of age or older). It is recognized that other housing types that are not age-restricted may attract persons of the specified ages because they are “senior friendly” and compatible with senior needs. This includes “aging in place” as well as relocating to housing that is not age-restricted.

**Figure 3: City of Davis Population Projections by Age Ranges 55+**



Notes:

- (a) Estimates are from the 2006-2008 American Community Survey 3-Year data set. These estimates are an average of samples collected from January 1, 2006 through December 31, 2008.
- (b) Population projections calculated using 1% compound annual average growth rate for each age and gender cohort, combined with Countywide changes in population distribution. See Appendices A and B for further detail.
- (c) The number of UC Davis students residing in the City of Davis is held at 2008 levels. All students are assumed to be in the Under 55 age category.

Sources: U.S. Census Bureau, American Community Survey 2006-2008, 2009; California Department of Finance, 2009; BAE, 2009.

**“2008 Senior Survey for People 60 and Older in Yolo County”.** This report was presented by the Area 4 Agency on Aging on October 1, 2009. The survey report contains:

- Information on the sample, the demographic targets and results, the geographic targets and results, and distribution among senior categories based on ability levels.
- Responses related to income, housing, transportation, and health insurance.
- Responses related to health and wellness, household characteristics, transportation, daily activities, needs and concerns, and services used.

404 paper surveys were returned and 426 on-line surveys were completed for a total sample size of 830. 49.6% of the respondents to this Yolo County survey were Davis city residents. Although the survey provides data that will inform Area 4 Agency programs, the 830 respondents are not a statistically representative sample of Davis seniors in terms of age, income, place of residence, expressed needs and concerns, etc. The survey did not ask questions about housing preferences.

The responses to a question on “Do you live in a ‘seniors only’ area” were:

- 22.3% yes
- 77.7% no

The responses to a question on “what kind of place do you live in?” (not whether the place is age-restricted or not) were:

- |  |       |
|--|-------|
| ▪ House and mobile home                | 73.9% |
| ▪ Apartment/condominium/townhouse      | 18.2% |
| ▪ Assisted living or board & care home | 4.0%  |
| ▪ Continuing care retirement community | 2.0%  |
| ▪ Other                                | 1.9%  |

**Other surveys and reports.** Other reports include:

AARP, 2000. A report by the American Association of Retired Persons (AARP), “Fixing to Stay – A National Survey of Housing and Home Modification Issues,” May 2000, included the following findings (quoting the report):

- Most Americans age 45 and over (the 45+ ages were included to capture the opinions of the “baby boom” age group) say they would like to remain in their current residence for as long as possible. In fact, 71 percent of respondents *strongly agree*, and an additional 12 percent *somewhat agree* that they want to stay in their current residence as long as possible.
- The percentage of respondents age 55 and over who *strongly* or *somewhat agree* that they would like to stay in their current residence for as long as possible has increased significantly since the question was last asked in 1992 to 2000 (from 84% to 89%).

NAHB, 2009. A report by the National Association of Home Builders (NAHB), “Housing for the 55+ Market – Trends and Insights on Boomers and Beyond,” April 2009, included the following findings:

- The majority of 55+ households do not live in age-restricted or other 55+ communities yet that number is expected to increase. The share of those living in active adult age-restricted communities grew from 2% in 2001 to 3% in 2007.
- The 55+ household distribution by 55+ community type in 2007 was:
  - Age-qualified active adult 3.0%
  - Other owner in 55+ communities 19%
  - Age-restricted rentals 4%
  - Other renter in 55+ communities 3%
  - Other 55+ households 71%
  - All 55+ households 100%

**Summary of outreach by Choices for Healthy Aging (CHA).** On November 2, 2009, the local group “Choices for Healthy Aging” (CHA) submitted a report with the results of their community outreach efforts. The CHA steering committee, in collaboration with Davis Neighbors Inc., has been conducting small group outreach discussions with approximately 1,100 community members to learn about what Davis residents are looking for as they plan for their future.

The goal of the report is to provide insight into the range of alternative housing and lifestyle choices that are not currently available or approved to be built in the city. The report from CHA is not intended to provide statistically significant data with the exception of the American Community Survey (ACS) current statistics on page 3 and 24 of the CHA report. These statistics show the increases in the Davis population and Davis residents aged 55+ from 2000 to 2008.

CHA is a group formed by Davis residents seeking a broader variety of housing choices in Davis within a future neighborhood development. Affiliation is open to anyone of any age who would like to support the goals of CHA. The steering committee consists of 13 long-time residents of the Davis community.

### **Summary of Draft Resolution**

*The draft resolution attached to this staff report consists of policy recommendations by staff based on the collected demographic data and local policies. Please refer to the draft resolution as staff does not attempt to duplicate all of the detailed information here. Staff recommends that the commissions utilize the one-page summary of the strategies on the fourth page of the draft resolution (which is the first page of Exhibit A, Senior Housing Strategies).*

The draft resolution directs staff to implement senior housing strategies under three senior housing issues:

#### ***Issue: How many and when?***

**Strategy 1: Strive to accommodate senior housing needs through targets for the number of new 55+ age restricted senior housing units** for the next 20 years. The targets equal approximately 1,000 units over 20 years and an annual average of 50 units / year, or 18.2% of housing units of all types.

This strategy is based on: the existing supply of senior housing in Davis; projections of senior households age 55+; and assumptions of a continuation of the 1% growth cap and that 15.3% of senior households are interested in age-restricted housing types.

Staff finds that the percentages of senior households interested in age-restricted housing, other kinds of housing, and “aging in place” in their current residence, varies by survey. Some communities are promoting alternatives to relatively large age-restricted housing projects including but not limited to: the facilitation of retrofits to existing homes to be senior-friendly; and facilitation of “naturally occurring retirement communities” which are senior-friendly but not senior segregated and can be developed with or without government programs.

**Issue: What types?**

**Strategy 2: Strive for general proportions of different types of new 55+ age restricted senior housing units** for the next 20 years. The general proportions of the 1,000 units targeted in Strategy 1 would be (in order of number of units, greatest to least):

- Active adult residences 500 units
- Market rate senior apartments 150 units
- Continuing care retirement community 150 units
- Assisted living 100 units
- Independent living (with limited services) 50 units
- Subsidized senior apartments 50 units
- Total of age-restricted senior housing 1,000 units

This strategy is based on: the existing types of housing that Davis seniors occupy; and targets that would “move” the Davis percentages closer to the national percentages of senior housing types through time. The minimum target amount is set at 50 units in order to allow for some units in each category, even in categories where the Davis percentage exceeds the national percentage. If progress is made toward the targets over 20 years (from January 2010 through the end of 2029), the strategy would “move” the 2009 Davis percentages toward the national proportions as follows:

Types of age-restricted senior housing units	Davis percentages in 2009	Target percentages for 2010 – 2029 (to move toward national percentages)	Potential new percentages by 2030	Increase / decrease from percentages in 2009
Continuing care retirement community	6.6%	15.0%	10.8%	Increase
Independent living (with limited services)	28.8%	5.0%	17.0%	Decrease
Assisted living	7.7%	10.0%	8.8%	Increase
Subsidized senior apartments	25.4%	5.0%	15.3%	Decrease
Market rate senior apartments (without services)	3.0%	15.0%	9.0%	Increase
Active adult residences	28.5%	50.0%	39.1%	Increase
Total of age-restricted senior households in housing units above	100.0%	100.0%	100.0%	---

**Issue: How to locate, plan and design?**

**Strategy 3.1: Adopt and implement the “Guidelines for Housing that Serves Seniors and Persons with Disabilities”** developed by the Social Services Commission and Senior Citizen Commission for age-restricted and general housing that can meet the needs of seniors and persons with disabilities.

**Strategy 3.2: Consider sites as potentially suitable for age 55+ senior housing, subject to additional review.** Part or all of these sites appear to worthy of consideration for senior housing use, based on their locational characteristics. Such consideration should be balanced with other residential and land use needs. Because the majority of seniors will not be living in age-restricted housing, seniors may choose to move into developments on any of these sites. A development application submitted on one of these sites, for 16 or more units, should be reviewed by the Senior Citizen Commission for a recommendation to the Planning Commission and City Council (as required by the project application process) for recommendations on any aspects of the site plan or design that would improve suitability for seniors and persons with disabilities.

The sites are:

1. DJUSD Headquarters (green light site 1)
2. Kennedy Place (green light site 2)
3. Nugget Fields (green light site 4)
4. 820 Sweet Briar Drive (green light site 5)
5. Downtown (green light site 8)
6. PG&E Service Center (green light site 9)
7. City / DJUSD Corporation Yards (green light site 12)
8. Civic Center Fields (green light site 16)
9. Cannery (yellow light site 21)
10. Covell Village - Option to Top of Cannery (yellow light site 31)

**Strategy 3.3: Establish the following guidelines to be utilized by City commissions and the City Council in reviewing a proposed age restricted development project or component of a project.**

- a. Minimum size for an age restricted project: 16 units.
- b. Maximum size for age restricted project: 250 units.
- c. Maximum size for one general housing type and density: 150 units.

The strategies would be implemented primarily through two other activities:

1. The review of the annual residential development status reports by City Council.
2. The review of development project applications.

As part of these activities, options for City Council include: findings that sufficient progress is being made on the strategies (including the targets); or findings / direction that development project applications accepted for processing should provide senior housing; or findings / direction that development project applications should provide senior housing of different types.

Staff asks that the commissions review the attached draft resolution, consisting of issues and strategies, and requests comments, questions and a recommendation that will be provided to the City Council in December 2009.

### **City Web Site**

For interested persons, staff is posting the documents related to this project on the City of Davis web site at: [www.cityofdavis.org/CDD/Senior\\_Housing\\_Strategy](http://www.cityofdavis.org/CDD/Senior_Housing_Strategy)

### **Attachments**

1. Draft Resolution of Senior Housing Strategies (includes “Guidelines for Housing that Serves Seniors and Persons with Disabilities”).
2. Existing Senior Housing Units in Davis, July 2009.
3. Updated “Senior Population and Housing Data and Projections 2007 – 2030,” Bay Area Economics, November 3, 2009. (an update to the previously distributed report dated September 29, 2009)
4. Community Outreach Results Submitted by Choices for Healthy Aging.

### **Other Reports**

The following other reports have been distributed previously to the Social Services and Senior Citizen commissions:

- “Senior Population and Housing Data and Projections 2007 – 2030,” Bay Area Economics, September 29, 2009.
- “2008 Senior Survey for People 60 and Older in Yolo County,” Area 4 Agency on Aging, October 2009.

Cc: Planning Commission

*planning/advance planning/senior strategies/staff rep to scc and ssc re draft resolution.doc*

**Attachment 1**

**Draft Resolution of Senior Housing Strategies**

**RESOLUTION NO. 09- , SERIES 2009**

**RESOLUTION BY THE CITY COUNCIL OF THE CITY OF DAVIS  
REGARDING SENIOR HOUSING STRATEGIES**

WHEREAS, on June 2, 2009, City Council received and approved a residential development status report, and as part of their motions directed staff to proceed with strategies for housing seniors in Davis through 2013 and beyond; and

WHEREAS, the strategies for housing seniors was intended to include: an evaluation of community needs, interest levels of seniors, senior housing share of the growth cap (per Resolution 08-019), and suitability of potential infill and peripheral sites; a building upon the work already started by the Senior Citizen and Social Services commissions in the “Guidelines for Housing that Serves Seniors and Persons with Disabilities;” and delivery of the strategies to City Council by December 31, 2009; and

WHEREAS, on February 12, 2008, the City Council adopted Resolution No. 08-019 to provide amended directions regarding an annual residential growth cap; and

WHEREAS, on November 5, 2008, the City Council adopted Resolution No. 08-158 to provide directions regarding the recommendations of the General Plan / Housing Element Steering Committee and an EIR Addendum pursuant to State CEQA Guidelines; and

WHEREAS, the City Council has received the report “Senior Population and Housing Data and Projections, 2008–2030,” prepared by Bay Area Economics, which provided information on:

- Projections of senior population and households;
- Profile of senior household incomes;
- Profile of senior housing choices; and

WHEREAS, the City Council has received a the “2008 Senior Survey for People 60 and Older in Yolo County,” prepared by the Area 4 Agency on Aging, which provided responses related to:

- Income, housing, transportation and health insurance;
- Health and wellness, household characteristics, transportation, daily activities, needs and concerns, and services used; and

WHEREAS, the purpose of the senior housing strategies is to plan for seniors based on demographic trends and to provide a guide for decisions on projects and programs; and

WHEREAS, the following goals, policies and actions provide the basis for the senior housing strategy:

- Encourage variety of housing types and care choices, as well as housing innovation, for seniors. (General Plan housing policy 1.8)
- Provide housing and care choices for seniors of all income levels. (General Plan housing action 1.8c)

- Periodically conduct demographic studies to predict the need for housing and care of senior citizens. (General Plan housing action 1.8a)
- Develop design guidelines and site criteria for senior housing and care. (General Plan housing action 1.8b)
- Encourage senior housing in all parts of Davis and near neighborhood centers, shopping centers, and public transportation. (General Plan housing policy 4.2)
- Advance an array of housing options targeting affordability, internal growth, University-related needs and housing needs of special populations . Ensure special needs housing for seniors and for those who have accessibility issues. (Council goal for 2009-10).
- Engage in long-term visioning. Develop a comprehensive plan for senior living in Davis, including elements for housing, transportation, recreation and social service needs (Council goal for 2009-10)
- Provide for the needs of the growing senior population within the context of other housing needs and overall growth policies and resolutions.
- Provide housing types that are expected to be needed and wanted, including different affordability levels.

WHEREAS, in November 2009, the Senior Citizen Commission and Social Services Commission provided recommendations regarding this resolution and senior housing strategies; and

WHEREAS, on December 8, 2009, the City Council received and considered the recommendations of the commissions and public input regarding the resolution.

**NOW THEREFORE, THE CITY COUNCIL OF THE CITY OF DAVIS DOES RESOLVE AS FOLLOWS:**

1. The City Council finds that the EIR Addendum approved by City Council on November 5, 2009 adequately addresses the environmental effects associated with residential development anticipated through June 13, 2013, including senior housing. The EIR Addendum found that: (a) the development sites to be considered require discretionary review with legislative actions and therefore the City has the ability to ensure that environmental effects have been adequately analyzed prior to project approvals; (b) environmental reviews will be required for each individual project; and (c) the City Council directions do not reduce the housing opportunities of the region, as the City is meeting its Regional Housing Needs Allocation (RHNA) through the Housing Element update.
2. The City Council hereby directs staff to implement the strategies described within the attached Exhibit A, Senior Housing Strategies.
3. The strategies in this resolution shall be considered in the review of development project applications and in other senior housing decisions through year 2013, or until a new long-range comprehensive General Plan update is adopted, whichever is sooner.
4. A review of the implementation of the strategies in this resolution should be made part of the annual residential development status reports reviewed by City Council.

PASSED AND ADOPTED by the City Council of Davis on this 8th day of December, 2009 by the following vote:

AYES:

NOES:

ABSENT:

Ruth Uy Asmundson, PhD  
Mayor

ATTEST:

---

Zoe Mirabile  
City Clerk

Attached Exhibits:

- A. Senior Housing Strategies.
- B. "Guidelines for Housing that Serves Seniors and Persons with Disabilities," Social Services Commission and Senior Citizen Commission, July 2009.

**EXHIBIT A**  
**SENIOR HOUSING STRATEGIES**

**Summary of Senior Housing Issues and Strategies**

*Issue: How many and when?*

**Strategy 1: Strive to accommodate senior housing needs through targets for the number of new 55+ age restricted senior housing units** for the next 20 years. The targets equal approximately 1,000 units over 20 years and an annual average of 50 units / year, or 16.7% of housing units of all types.

This strategy is based on: the existing supply of senior housing in Davis; projections of senior households age 55+; and assumptions of the continuation of the 1% growth cap and the percentage of senior households that are interested in age-restricted housing types.

*Issue: What types?*

**Strategy 2: Strive for general proportions of different types of new 55+ age restricted senior housing units** for the next 20 years. The general proportions of the 1,000 units targeted in Strategy 1 would be (in order of number of units, greatest to least):

▪ Active adult residences	500 units
▪ Market rate senior apartments	150 units
▪ Continuing care retirement community	150 units
▪ Assisted living	100 units
▪ Independent living (with limited services)	50 units
▪ <u>Subsidized senior apartments</u>	<u>50 units</u>
Total of age-restricted senior housing	1,000 units

This strategy is based on: the existing types of housing that Davis seniors occupy; and targets that would “move” the Davis percentages closer to the national percentages through time.

*Issue: How to locate, plan and design?*

**Strategy 3.1: Adopt and implement the “Guidelines for Housing that Serves Seniors and Persons with Disabilities”** developed by the Social Services Commission and Senior Citizen Commission for age-restricted and general housing that can meet the needs of seniors and persons with disabilities.

**Strategy 3.2: Consider sites as potentially suitable for age 55+ senior housing, subject to additional review.** Part or all of these sites are worthy of consideration for senior housing use, based on their locational characteristics. Even if the sites are not developed with age-restricted housing, seniors are likely occupants. Consideration for senior housing should be balanced with other residential and land use needs. A development application submitted on one of these sites, for 16 or more units, should be reviewed by the Senior Citizen

Commission for a recommendation to the Planning Commission and City Council (as required by the project application process) for recommendations on any aspects of the site plan or design that would improve suitability for seniors and persons with disabilities.

The sites are:

1. DJUSD Headquarters (green light site 1)
2. Kennedy Place (green light site 2)
3. Nugget Fields (green light site 4)
4. 820 Sweet Briar Drive (green light site 5)
5. Downtown (green light site 8)
6. PG&E Service Center (green light site 9)
7. City / DJUSD Corporation Yards (green light site 12)
8. Civic Center Fields (green light site 16)
9. Cannery (yellow light site 21)
10. Covell Village - Option to Top of Cannery (yellow light site 31)

**Strategy 3.3: Establish the following guidelines to be utilized by City commissions and the City Council in reviewing a proposed age restricted development project or component of a project.**

- a. **Minimum size for age restricted project.** An age restricted housing project or component of a project is generally expected to consist of at least 16 units.
- b. **Maximum size for age restricted project.** An age restricted housing project or component of a project should be limited to a maximum of approximately 250 units.
- c. **Maximum size for one general housing type and density.** One general housing type / density / design in an age-restricted housing project or component of a project should be limited to a maximum of approximately 150 units.

## Senior Housing Strategies

**Issue: How many and when?**

### **Strategy 1:**

**Strive to accommodate senior housing needs through the following targets for the number of new 55+ age-restricted senior housing units for the next 20 years (January 2010 through the end of 2029).**

Time period	Davis target	
	Units	Approximate average / year
Total of all housing units for all ages From January 2010 through end of 2029 (20 years)	6,000 units (= 100.0% of all housing units)	300 units / year
To provide for existing need for age-restricted senior housing through end of 2009, in any year	200 units <sup>1</sup>	N/A
To provide for age-restricted senior housing demand from January 2010 through end of 2014 (five years)	155 units	30 units / year
To provide for age-restricted senior housing demand from January 2015 through end of 2019 (five years)	190 units	40 units / year
To provide for age-restricted senior housing demand from January 2020 through end of 2029 (ten years)	460 units	45 units / year
Total of age-restricted housing units above From January 2010 through end of 2029 (20 years)	1,000 units (805 <sup>2</sup> + 200 = 1,005 rounded to 1,000) (= 16.7% of all housing units)	50 units / year
Total of non age- restricted housing units From January 2010 through end of 2029 (20 years)	5,000 units (= 83.3% of all housing units)	250 units / year

Footnote for table above:

<sup>1</sup> A description of this existing need is provided in the “Basis for Strategy1” on page 8.

<sup>2</sup> Demand for age-restricted housing for 55+ from 2010-2030 = 808 housing units from Key Assumption 5, BAE report.

Summary of target in relation to all senior households	U.S. % 2007	Davis % end of 2009 <sup>2</sup>	Davis target % 2010 through 2029 <sup>3</sup>	Davis target units 2010 through 2029 <sup>4</sup>
Senior households in age-restricted housing units	15.3% <sup>1</sup>	12.7% (1,012 of 7,952 senior households)	18.2% (= 1,000 / 5,507, i.e. 5,307 increase in sr households 2010-2029 + 200 to meet existing need)	1,000 units
Senior households not in age-restricted housing units	84.7%	87.3%	81.8% (to accommodate increase 2010-2029)	4,505 units
All senior households	100.0%	100.0%	100.0% (to accommodate increase 2010-2029 and to meet existing need)	5,505 units

Footnotes for second table above:

<sup>1</sup> 2007 estimate by American Senior Housing Association for the types of units occupied by senior households in the U.S.

<sup>2</sup> Estimate of existing senior households based on Tables 1 and 3 of BAE and inventory of existing senior units.

<sup>3</sup> Increase in senior households per Table 3 of BAE and need based on inventory of existing senior units.

Percentages and units shown are new units and do not include the 1,012 existing senior housing units in Davis in 2009.

<sup>4</sup> The total number of units are through 2029. Numbers are rounded to nearest whole number of 5.

### Other aspects of Strategy 1

- a. *Intent.* The intent of the targets is to generally provide for, without exceeding, senior housing needs based on household projections. The targets are intended as a guide for overall amounts, not numbers that would be provided precisely in any one-year or five-year period. The targets are not absolute caps but are expectations, based on a recognition that there are senior housing needs, as well as other housing needs.
- b. *Goal to distribute.* As a general goal, the senior housing units in a category should be distributed over the twenty years and not over only a few years. In order to distribute the units through time and to provide a limit in any five-year period, consider limiting the number of approved units in a five-year period to two times the targeted number of units.
- c. *Implementation.* Progress toward the targets should be considered as part of the annual residential development status reports reviewed by City Council. Options for the Council include but are not limited to: determining that sufficient progress in being made toward the targets; or directing that development project applications should be accepted for processing with the understanding that additional senior housing should be considered. As part of the residential development status report, the City Council should find whether the overall actual and anticipated amounts of residential development would affect the amount of senior housing that should be considered (for example, if the overall amount is far below the 1% growth assumption which in part led to the projected demand for senior housing).

### Basis for Strategy 1

The projections assume: a 1% growth rate based primarily on the internal needs of projected employees (which led to growth cap resolution by Council); the student population living in the City is held stable; and shifts in age brackets assume age groups in City mirror trends in County overall. (BAE report, November 2009).

The strategy plans for seniors of ages 55+ (rather than 60+ or 65+) to be inclusive of existing and emerging seniors, to not “under-project” the needs.

The strategy assumes that approximately 15.3% of seniors are interested in age-restricted housing types. This is based on estimates by the American Senior Housing Association (ASHA) of 2007 U.S households age 65+ living in each type of senior housing. The target for 2010 through 2029 includes the 55 - 64 age group by assuming that approximately 15% of the households in the 55 - 64 age group would contribute demand for 185 units of age-restricted housing between 2010 and 2030 in Davis. This assumption may tend to slightly

“over-project” the demand because it is likely that fewer than 15% of the households in the 55 - 64 age group would demand age-restricted housing.

The strategy assumes that through the end of 2009 there exists an “under-supply” of 200 units (205 rounded) of senior age-restricted housing units and that it should be made part of the target for 2010 – 2029. This assumption is based on: There will be approximately 7,952 senior households with at least one member age 55+ in the city in January 2010, times 15.3%, equals a demand for 1,217 units (the 7,952 estimate uses the 2008 population figures from Table 1 in the BAE report and adds them into the 2008-2010 increase of households in Table 3); and there is a supply of 1,012 age-restricted units in the city, not including two convalescent / nursing homes.

**Issue: What types?**

**Strategy 2:**

**Strive for the following general proportions of different types of new 55+ age restricted senior housing units** for the next 20 years (January 2010 through the end of 2029).

Types of age-restricted housing units	U.S. 2007 % of existing senior age-restricted units <sup>1</sup>	Davis 2009 % of existing age-restricted senior units	Davis target % 2010 -2029 <sup>2</sup> (to move toward national percentages)	Davis target units 2010 -2029 <sup>3</sup>
Continuing care retirement community	13.1%	6.6 %	15.0%	150 units
Independent living (with limited services)	7.8%	28.8%	5.0%	50 units
Assisted living	10.5%	7.7%	10.0%	100 units
Subsidized senior apartments	9.8%	25.4%	5.0%	50 units
Market rate senior apartments (without services)	13.1%	3.0%	15.0%	150 units
Active adult residences	45.7%	28.5%	50.0%	500 units
Total of senior households in age-restricted housing units above	100.0% (of all households living in senior age-restricted housing)	100.0% (of existing 1,012 units)	100.0% (to provide for increase in senior households and existing need)	1,000 units

Footnotes for table above:

<sup>1</sup> The column of U.S. 2007 percentages of existing senior age-restricted units converts the estimated percentages by the American Senior Housing Association for all existing senior households of which 15.3% live in age-restricted housing types of: continuing care retirement community 2.0%; independent living 1.2%; assisted living 1.6%; subsidized senior apartments 1.5%; market rate senior apartments 2.0%; and active adult residences 7.0%.

The American Senior Housing Association uses the following descriptions for senior housing types:

Continuing Care Retirement Communities (CCRCs) are age-restricted properties that include a combination of independent living, assisted living and skilled nursing services (or independent living and skilled nursing) available to residents all on one campus. Resident payment plans vary and include entrance fee, condo/co-op, and rental programs. The majority of the units are not licensed skilled nursing beds. CCRCs offer a variety of living arrangements and services to accommodate residents of all levels of physical ability and health. The goal of a CCRC is to provide residents with a total range of options to accommodate their changing lifestyle preferences and health care needs as they age.

Independent Living Communities are age-restricted multifamily rental properties with central dining facilities that provide residents as part of their monthly fee with access to meals and other services such as housekeeping, linen services, transportation, and social and recreational activities. Such properties do not provide, in a majority of the units, assistance with activities of daily living (ADLs) such as supervision of medication, bathing, dressing, toileting, etc. There are no licensed skilled nursing beds in the property. Typically, these residences are multifamily structures with 70 to 250 units in high-rise or mid-rise buildings. Individual living units usually include kitchens and apartments decorated and furnished by the resident. Most residences include extensive common areas and activity spaces. Units are usually rented but may include condominium or cooperative ownership structures with a monthly service fee. Services vary but often include: building security, laundry, 24-hour staff presence, and on-call nurse or physician.

Assisted Living Residences are State regulated rental properties that provide all of the same services as independent living communities listed above, but also provide, in a majority of the units, supportive care from trained employees to residents who are unable to live independently and require assistance with activities of daily living (ADLs) including management of medication, bathing, dressing, toileting, ambulating and eating. These properties may have some nursing beds but the majority of units are licensed for assisted living. Many Assisted Living properties include wings or floors dedicated to residents with Alzheimer's or other forms of dementia. Assisted living residences differ from independent living communities in one significant way - they include 24-hour protective oversight and assistance for individuals with functional limitations. Assisted living residences are residential dwellings, typically with less than 100 apartment units and many resemble large single-family homes and house 30 to 60 residents. Most offer private rooms with kitchenettes and common living and dining areas.

Senior Apartments are multifamily residential rental properties restricted to adults at least 55 years of age or older. These properties do not have central kitchen facilities and generally do not provide meals to residents, but may offer community rooms, social activities, and other amenities. These properties typically offer a limited array of supportive care services and/or service coordination, or none at all.

Active Adult Residences are not defined by ASHA, but are generally age-restricted/qualified or age-targeted (marketing materials are aimed at seniors, but residents are not required to be of a certain age) communities. Active adult communities can include a range of unit and ownership types. (Source of this description: BAE)

<sup>2</sup> Percentages and units shown are new units and do not include the existing 1,012 senior housing units in Davis in 2009.

<sup>3</sup> The total number of targeted units through 2029 is from Strategy 1. Numbers are rounded to nearest whole number of 5. No target is lower than 50 units in order to allow for some units in each category, even in categories where the Davis percentage exceeds the national percentage.

## Other aspects of Strategy 2

- a. *Intent.* The intent of the targets is to generally provide for the varied housing needs of seniors during the next twenty years. Descriptions for the senior housing types are from the American Senior Housing Association (see Tables 10 and 11 of the BAE report). The targets are intended as a guide for the types of senior housing units that would be provided and are not intended to be required in any one-year or five-year period.
- b. *Goal to distribute.* As a general goal, the “active adult residences” should be distributed over the twenty year period if possible (rather than over a few years) due

to the large number of units in this category and the ability to phase these units over many years.

- c. *Implementation.* Progress toward the targets should be considered as part of the annual residential development status reports reviewed by City Council. Options for the Council include but are not limited to: determining that sufficient progress in being made toward the targets; or directing that development project applications should be accepted for processing with the understanding that different types of senior housing should be considered.

### Basis for Strategy 2

The strategy utilizes projections based on the current estimated supply of senior housing in the U.S. in 2007 (American Senior Housing Association). The projections apply the senior housing choice data from ASHA to the projected increase in Davis households. It is recognized that the projections may under-estimate the potential demand for different types of senior housing that may be under-supplied in the U.S. at this time or for new types of senior housing that may be developed in the future.

The targeted percentages and numbers of units would “move” the 2009 Davis percentages closer to the national percentages through time. The categories of units in Davis which are below the national average, such as “active adult residences”, receive higher percentages than other categories, while a minimum of 50 units are provided in all categories.

Issue: How to locate, plan and design?

### **Strategy 3.1:**

**Adopt and implement the “Guidelines for Housing that Serves Seniors and Persons with Disabilities”** developed by the Social Services Commission and Senior Citizen Commission for age-restricted and general housing that can meet the needs of seniors and persons with disabilities.

The guidelines:

- Recognize and support the preference of many seniors and persons with disabilities to remain in their current homes (commonly referred to as “aging in place”).
- Promote options within general housing projects for seniors and persons with disabilities: accessibility / visitability; transportation; affordability; and housing options.
- Promote appropriate specialized housing for local seniors and persons with disabilities: determination of need, including independent market analysis; fiscal impact analysis; special needs to be considered in environmental impact reports; age-restricted, age-qualified, or other housing types that serve seniors and persons with disabilities; supportive services; public transit; location of sites; and amenities.
- Recognize that seniors and persons with disabilities may not have personal transportation, and that the preferred location for housing these persons should be close to the following:

- Public transit lines (if no on-site shuttle) and preferably within 200 feet of a transit stop.
- A neighborhood shopping center, especially a grocery store and pharmacy.
- A medical facility that could provide general health services and prescriptions.
- Encourage a variety of housing options, including options that are within close proximity to the downtown and other destination areas within the city.

The guidelines should be considered as part of the city's standard review process of the development project applications.

#### Basis for Strategy 3.1

General Plan Action Housing Action 1.8b states that design guidelines and site criteria should be developed for senior housing and care.

In 2008-2009, the Social Services Commission and Senior Citizen Commission developed the guidelines to assist in the City's review of housing projects, and to provide additional information to developers of prospective developments with both general and specialized housing that could be developed in a manner that meets the needs of seniors and persons with disabilities.

#### **Strategy 3.2:**

**Consider sites as potentially suitable for age 55+ senior housing, subject to additional review.**

The reason for identifying a list of sites is that part or all of these sites are worthy of consideration for senior housing use, based on the locational criteria in the "Guidelines for Housing that Serves Seniors and Persons with Disabilities." Even if the sites are not developed with age-restricted housing, seniors are likely occupants. Such consideration should be balanced with other residential and land use needs. The identification of this list does not preclude other sites being considered for senior housing, and does not mean that these sites should necessarily be developed with senior housing units, with or without age restrictions. It is also recognized that these sites, because of location, would likely serve some of the senior households that do not choose to live in age-restricted housing units.

A development application submitted on one of these sites, for 16 or more units, should be reviewed by the Senior Citizen Commission for a recommendation to the Planning Commission and City Council (as required by the project application process) for recommendations on any aspects of the site plan or design that would improve suitability for seniors and persons with disabilities.

The sites are:

1. DJUSD Headquarters (green light site 1)
2. Kennedy Place (green light site 2)
3. Nugget Fields (green light site 4)
4. 820 Sweet Briar Drive (green light site 5)
5. Downtown (green light site 8)

6. PG&E Service Center (green light site 9)
7. City / DJUSD Corporation Yards (green light site 12)
8. Civic Center Fields (green light site 16)
9. Cannery (yellow light site 21)
10. Covell Village - Option to Top of Cannery (yellow light site 31)

#### Basis for Strategy 3.2

The ten sites are substantially consistent with the locational criteria in the “Guidelines for Housing that Serves Seniors and Persons with Disabilities” as sites potentially suitable for age 55+ senior housing, subject to adherence to the housing growth caps and housing type targets in this resolution, housing resolution 08-158, and growth cap resolution 08-019. The sites are substantially consistent with the criteria of:

- Public transit lines are adjacent to the site, and additional lines might be planned within a development on the site.
- A neighborhood shopping center, especially a grocery store and pharmacy, is close to (interpreted to be within a half mile of) the site.
- A medical facility that could provide general health services and prescriptions is close to (interpreted to be within a half mile of) the site.

In November 2008, the City Council adopted Resolution No. 08-158 based on the recommendations of the General Plan / Housing Element Steering Committee, including potential housing site analyses and rankings.

#### **Strategy 3.3:**

**Establish the following guidelines to be utilized by City commissions and the City Council in reviewing a proposed age restricted development project or age-restricted component of a project.**

- a. **Minimum size for age restricted project.** An age restricted housing project or component of a project is generally expected to consist of at least 16 units.
- b. **Maximum size for age restricted project.** An age restricted housing project or component of a project should be limited to a maximum of approximately 250 units.
- c. **Maximum size for one general housing type and density.** One general housing type / density / design in an age-restricted housing project or component of a project should be limited to a maximum of approximately 150 units.

This strategy should be considered in the review of development applications for senior age-restricted housing projects.

#### Basis for Strategy 3.3 (a, b and c)

The minimum size guideline is to promote opportunities for a sense of community, common amenities, an on-site manager (a State requirement for 16 or more rental units), and overall economic stability.

The maximum size guideline is to implement General Plan policies and adopted interpretations which promote neighborhoods with a diversity of housing options to provide for diverse needs and household types, rather than more segregated patterns.

- General Plan Vision 3 states: Celebrate and encourage a diverse cultural community. Promote changes of social structures which limit equal access or participation on the basis of ...age....
- Vision 6 states: Promote in each neighborhood a diversity of housing options that will enable people with wide range of needs, economic levels, cultural identities, and ages to live in Davis.
- General Plan Land Use Policy A.3 and Housing Standard 1.1b require that each new development area should include a mix of housing types, densities, prices and rents, and designs. Both refer to the General Plan policy interpretation document titled “Mix of Residential Types, Densities, Prices and Designs.”
- General Plan Housing Standard 1.1a states that housing, including affordable housing, should include a range of unit sizes appropriate to meet Davis housing needs.
- General Plan Urban Design Standard 2.4d states that multi-family housing complexes should be designed, constructed and managed in projects of no more than 150 units, not including any density bonus (which would equal 188 units with a 25% density bonus and 202 units with a density bonus of 35%).
- The “Mix of Residential Types...” policy interpretation, adopted by City Council and incorporated by reference in the General Plan, states that:
  - A new development should provide the maximum possible mix of housing types, densities, prices and rents, and designs that is feasible. Recognizing that feasibility is affected by the size of the development, location, and other policies. A general model is provided for a project of seven general housing types within the project, with a ratio of one type for approximately every 10 gross acres and 100 dwelling units. Housing types are described as different types and density ranges of single-family detached, single family attached, and multi-family.
  - A project sub-area consisting of one general housing type and density should be limited to a maximum of approximately 150 units, not including density bonus.

Although the “Mix of Residential Types...” policy interpretation did not specifically address the maximum size of an age-restricted development, age-restricted housing is interpreted here as one housing type. This is based on General Plan policies promoting a mix of housing types and ages in each neighborhood and new development area. The largest existing example of a senior housing project is the “University Retirement Community” market rate project consisting of 240 dwelling unit equivalents for seniors and the adjacent “Shasta Point” affordable project (which provides for the affordable requirement of URC) consisting of 67 units.

**EXHIBIT B**  
**GUIDELINES FOR HOUSING THAT SERVES  
SENIORS AND PERSONS WITH DISABILITIES**  
(Final Draft- July 9, 2009)

---

Policy statement: The Senior Citizens Commission and Social Services Commission recognize the importance of integrated housing that provides a wide variety of housing choices for seniors and persons with disabilities, including housing types, designs and prices. The commissions support the expressed preference<sup>1</sup> by these groups for a variety of housing options that allow individuals to remain in their own homes, more commonly referred to as “aging-in-place.” Furthermore, the Commissions place importance on providing housing that can address the specific needs of seniors and persons with disabilities within the city’s general housing stock, while also recognizing the need for some specialized housing options.

**A. General Housing Guidelines - to promote options within general housing projects for seniors and persons with disabilities.**

- **ACCESSIBILITY/VISITABILITY – Continue to promote accessibility and visitability in future rental and ownership units.**
  - Make available the state’s universal design features checklist in newly and substantially rehabilitated single-family units where an owner is identified prior to city issuance of building permits. (The universal design features checklist includes optional features related to providing better access and usability in a housing unit, in accordance with Section 18.09 of the Davis City Municipal Code. These features include but are not limited to zero threshold entry, exterior and interior paths of travel, accessible half or full bathroom, and accessible common room on ground level. )
  - Ensure affordable rental projects include fully accessible and visitable units, maximizing opportunities for both through stacked flat units accessible by an elevator.
  - Design new housing units so that future modifications to increase unit accessibility, functionality, and visitability can be made in an economical and efficient manner that accommodates aging in place.
  
- **TRANSPORTATION – Continue to promote and encourage public transit as an affordable and environmentally-sound alternative to personal vehicles.**
  - Locate public transit access (e.g. bus stop) conveniently near new ownership and rental housing projects and make it accessible through a safe and easily navigated route.

---

<sup>1</sup> The term “expressed preference” refers to a June 16, 2008 Davis Senior Citizens Commission staff report, specifically stating the following reference: “AARP studies have shown a preference of seniors and individuals over 45 stating a preference to remain in their home, aging in place. A study that sampled 2,001 Americans over the age of 45 showed that approximately four out of five, or 83% of households surveyed stated a desire to remain in their current residence for “as long as possible.”

- Assess transportation for new housing projects based on size. Projects should contribute to City public transit needs through the contribution of 1% of the overall project cost to a public transit fund to assist with furthering City transit services and education (i.e. mobility training and frequency of transportation lines, such as in the evenings and on weekends).
  - Ensure adequate greenbelt and bike path connectivity.
  - Provide funding for electric/alternative fuel vehicles for shared resident use and the infrastructure to support it.
- **AFFORDABILITY – Provide a variety of housing types and prices, including city subsidized, affordable and middle income housing requirements, in an effort to provide housing opportunities for all income levels.** Multi-family and single-family housing units in both rental and ownership types can provide opportunities for a variety of affordability needs when paired with the city’s affordability requirements.
  - **HOUSING OPTIONS – Promote various housing models in new housing developments that could accommodate seniors and persons with disabilities.** Housing types could include single-family homes, duplexes, half-plexes, condominiums, and town homes. Creative options can also be explored, including “cluster housing,” cooperative housing, co-housing, and shared housing models. A variety of housing options should be provided for local seniors and persons with disabilities, including options that are within close proximity to the downtown and other destination areas within the city.

**B. Guidelines for Housing Restricted to Seniors and/or Persons with Disabilities – to promote appropriate specialized housing for local seniors and persons with disabilities.**

- **DETERMINE NEED - Determination of housing type should be accomplished in response to the expressed desires of the community through local outreach and measurements of local demand.**
  - **INDEPENDENT MARKET ANALYSIS - Market analysis of the true community need for housing should be done by an independent consultant.**  
The analysis should speak to:
    - Affordability -in which the term is used in its broadest sense to include households of any income within the City of Davis and their existing cost burdens including consideration of expenses such as medical, caregiving, utilities, etc.
    - Marketability – a project-specific determination if there is a true local and current demand for the specific types of housing proposed.
    - Preferences of Seniors and Persons with Disabilities –  
For age-restricted<sup>2</sup> and age-qualified<sup>3</sup> senior housing include:

---

<sup>2</sup> Age-restricted housing: Housing developments that require 100% of the units to be occupied by persons 62 years of age or older. (see Appendix)

1. consideration of senior majority preference to remain in their own homes in Davis, known as aging-in-place.
2. other senior preferences related to amenities and unit size/downsizing.

For housing to serve persons with disabilities consider:

1. housing features necessary for the person being served and whether space for a caregiver is necessary.
  2. preferences for independent living with support services available.
- Current Waitlists – current waitlists for similar projects existing within Davis should be considered and this information should be included in the analysis.

In determining the local need for senior housing, age definitions and restrictions must be well defined (e.g. age 55 and over, or age 62 and over).

- **FISCAL IMPACT – As part of the fiscal analysis of a proposed project that includes housing restricted to seniors and persons with disabilities, additional fiscal impacts to city services and county social services should be considered based on the population being served, including:**
  - **CITY SERVICES:** Emergency Medical Response (ambulance, police, fire), Davis Community Transit, the Davis Senior Center, etc.
  - **SUPPORTIVE SOCIAL SERVICES:** Impacts on County & other social service providers (In-Home Supportive Services, Older Adult program, Adult Protective Services, etc) that provide services to seniors and persons with disabilities.
- **ENVIRONMENTAL IMPACT REPORT – When developing an Environmental Impact Report (EIR) for a proposed project that includes housing for seniors and persons with disabilities, the EIR shall consider the additional needs (mobility, respiratory, etc.) of the groups being served.**
- **AGE-RESTRICTED<sup>2</sup>, AGE-QUALIFIED<sup>3</sup>, OR OTHER HOUSING TYPES THAT SERVE PERSONS WITH DISABILITIES** – The following types of housing models should be considered in the construction of housing for seniors and persons with disabilities:
  - **INDEPENDENT LIVING:** ownership and rental housing with a variety of housing sizes & options including, but not limited to: cottages, townhouses, mobile homes, independent living facilities, shared-housing options, and apartments that could include supportive services.
  - **SUPPORTIVE HOUSING:** ownership and rental housing projects or units set-aside for specific ages or disabilities that include supportive services such as meals, laundry and other activities of daily living, but do not provide 24-hour residential care.
  - **ASSISTED-LIVING FACILITY:** a residential care facility for the elderly or persons with disabilities who need assistance with some activities of daily living or prefer the availability of services and support staff.

---

<sup>3</sup> Age-qualified housing: Housing developments that require a minimum of 80% of the units to be occupied by at least one person who is 55 years of age or older. (see Appendix)

- **CONTINUUM OF CARE FACILITY:** a range of housing types within a housing project that provides housing options for households with a range of assistance needs, from independent living to skilled nursing.
- **GROUP CARE HOMES:** a home or residential care facility that for a period exceeding 24 hours provides personal care, nursing care, or custodial care for 3 or more unrelated persons, but not including medical treatment for the acutely ill.
- **CRISIS/SHELTER FACILITY:** facilities with 24-hour support staff that assist in identifying permanent housing opportunities or support services for seniors and persons with disabilities.

*Please Note: SKILLED NURSING is not considered housing but rather a medical facility regulated by state licensing.*

- **SUPPORTIVE SERVICES – The following types of support services should be considered in housing for seniors and persons with disabilities:**
  - **ON-SITE SUPPORTIVE STAFF:** The need for medical, clinical, or psychological supportive staff and program planning and referral staff.
  - **OTHER SERVICES:** The need for meal services, health services, recreational activities, transit services and other basic life services being provided on-site.
  - **HOUSING OPTIONS FOR CAREGIVERS:** Provide housing options for caregivers on-site or close to housing units for seniors and persons with disabilities.
- **TRANSPORTATION – Continue to promote and encourage public transit as an affordable and environmentally-sound alternative to personal vehicles.**
  - Locate public transit access (e.g. bus stop) conveniently near new ownership and rental housing projects and make it accessible through a safe and easily navigated route. *Preference for distance to transit access to be within 200 feet.*
  - Assess transportation for new housing projects based on project size. Based on size, projects should contribute to City public transit needs by one of the following:
    - Provision of a shuttle service for project residents to use for daily living & activity needs (i.e. medical appointments, shopping, entertainment); or
    - Contribution of 1% of the overall project cost to a public transit fund to assist with furthering City transit services, particularly on weekends and holidays.
  - Ensure adequate greenbelt and bike path connectivity.
  - Provide funding for electric/alternative fuel vehicles for shared resident use and the infrastructure to support it.
- **LOCATION – Since seniors and persons with disabilities may not have personal transportation, the preferred location for any proposed housing for seniors and persons with disabilities should be close to the following:**
  - Public transit lines (Unitrans and/or Yolo Bus) if there is no on-site shuttle, preferably within 200 feet of a transit stop.
  - A neighborhood shopping center, especially a grocery store and pharmacy.
  - A medical facility that could provide general health services and prescriptions.

- A variety of housing options should be provided for local seniors and persons with disabilities, including options that are within close proximity to the downtown and other destination areas within the city.
- **AMENITIES – Since seniors and persons with disabilities have a variety of personal needs, preferences, and expectations, consider inclusion of the following:**
  - Low maintenance open space/yards
  - Optional exterior/interior maintenance programs
  - Energy efficiency features
  - Sufficient heating and cooling (based on individual sensitivities)
  - Security and safety options
  - Accommodations for pets (dog run, etc.)
  - Community gardens
  - Community room and gathering space
  - Temporary housing opportunities for visiting family and friends
  - Health monitoring technologies or daily check-ins
  - On-site clinic, rehabilitation center, or wellness & exercise programs
  - Infrastructure to support electrical/alternative fuel vehicles for personal use.

**Appendix:**

- Protecting the Age-Restricted Status of Your Community
- Summary of the Federal Housing Act and Senior Housing

## **Protecting the Age-Restricted Status of Your Community**

Aging baby boomers and improved medical care, both having increased our life expectancy, combine to create a huge housing need for seniors. It is projected that by 2030 there will be almost 88 million people age 60 or older in the United States. To meet this growing need, builders are increasing the percentage of homes they build for the age-restricted or age-targeted markets. Age-targeted communities appeal to older buyers because of the style of the home and the amenities and conveniences provided, but do not restrict the age of residents. Age-restricted communities must meet the requirements of the Fair Housing Act of 1968.

In 1968, Congress enacted the Fair Housing Act to prevent discrimination in the housing market based on race, color, religion or national origin. In 1988, Congress amended this Act to include handicapped persons and familial status (one or more persons under the age of 18 who live with a parent or guardian) as protected classes. Certain exemptions were carved out to allow for age-restricted communities under the Housing For Older Persons Act of 1995. There are 2 types of age-restricted communities permitted by the Fair Housing Act. The first type of age-restricted community is where at least 80% of the units must be occupied (not owned) by at least one person 55 years of age or older. The second type allowed is a community where 100 % of the units are occupied by persons 62 years of age or older. Most of the age-restricted community associations fall into the 55 plus category.

Once an age-restricted community is turned over to the homeowners, it is the responsibility of the community leaders and the Community Manager to abide by the requirements of the Fair Housing Act relating to exemption for age-restricted communities.

The Housing for Older Persons Act of 1995 revised the definition of the original exemption contained in the Fair Housing Act. To qualify for exemption, a community must show that:

- It is intended and operated for occupancy by persons 55 years of age or older, and
- At least 80 percent of the units are occupied by at least one person who is 55 years of age or older; and
- It provides for age verification by reliable surveys and affidavits; and
- It has published and adheres to policies and procedures that demonstrate its intent to qualify for the exemption.

HOPA (Housing for Older Persons Act) eliminated the requirement of “significant facilities and services” previously required by the Amended Fair Housing Act to meet the 55-and-older exemption.

Following are some tips to help you protect the age-restricted status of your community:

- **80/20 Rule:** Be certain that for 80 percent of the units, one occupant is 55 or older. For new construction this applies after 25% of the units are occupied. Unoccupied units are not included in the total when calculating the 80%.
- **Occupancy vs. Ownership:** Keep in mind that the Act is interested in who is residing in the unit, not who owns the unit. If an owner is 55 or older but leases his unit to a resident who is not yet 55, that unit must be counted as a unit that does not meet the age requirement. If 20% of the units are already occupied by residents who are not 55 years of age, you lose your exemption if you permit a lease that increases that percentage beyond the maximum of 20%.
- **Intent to Comply:** Demonstrate that the community intends to operate as housing for people 55 years of age or older. This can be accomplished through the covenants and restrictions, resolutions outlining the procedure for verifying the age of residents, community rules and regulations, disclosures in marketing and resale materials, leasing provisions and signage indicating the name of the community and notice that it is a community for persons 55 and older. The use of phrases such as “adult living” or “adult community” is not consistent with the intent to operate as a 55 plus community.
- **Proof of Age Procedures:** It is essential for the builder to verify the ages of initial purchasers to comply with the intent of the governing documents. To comply with the HOPA restrictions, the community must develop reliable surveys and affidavits. Procedures must be adopted to ensure that at least one occupant is at least 55 years of age or older for 80 percent of the units. Acceptable proof of age includes driver licenses, passports, immigration cards, military identification cards, birth certificates and other government documents that show a date of birth. If an occupant refuses to provide proof of age, an affidavit from a person, not in the household, who has personal knowledge that the resident is at least 55 years of age or older is acceptable. Verification of occupant ages must be completed every two years to ensure that your community is within the acceptable 80/20 required ratio.
- **Document and Local Restrictions:** You must be aware of all restrictions in your governing documents that would require a higher percentage of occupants to be 55 years of age or that prohibit leasing as another way to control the ages of occupants. Local municipalities may have requirements that may be more restrictive than the federal Acts and you would have to satisfy those requirements and not just meet the federal standards.

Failure to comply with the provisions of the Fair Housing Act and Housing for Older Persons Act will result in loss of protected status. Should this happen, the community could no longer legally restrict the sale of homes to persons under 55 years of age. For the seniors seeking not just a home, but a lifestyle, this is a critical aspect to ownership in a community originally intended for residents over 55 years of age. A simple plan will save the community and its residents from many emotional and legal hassles. An ounce of prevention is worth the proverbial pound of cure.

<http://www.associationtimes.com/articles2005/ProtectAgeRes0305.html>

What is an age qualified community? It's one where 80% of residents have to be over 55. They are known as retirement communities, active adult communities, or 55+ communities. Most of them are larger, planned communities that offer a great variety of activities, from social clubs to exercise facilities. They can be single-family, townhomes, manufactured homes, or have a mix of housing styles.

<http://www.agequalified.com/>

## **Summary of the Federal Fair Housing Act and Senior Housing**

The Fair Housing Act (FHAct) protects all citizens from discrimination on the basis of race, color, national origin, religion, sex, handicap or familial status (families with children under the age of 18 living with parents or legal guardians; pregnant women and people trying to get custody of children under 18).

### **Senior Housing Exemption**

Although the FHAct was amended in 1988 to prohibit discrimination on the basis of disability and familial status, Congress intended to preserve housing specifically designed to meet the needs of senior citizens. Housing that meets the FHAct definition of "housing for older persons" is **exempt** from the law's familial status requirements, provided that:

- HUD has determined that the dwelling is specifically designed for and occupied by elderly persons under a Federal, State or local government program or
- It is occupied solely by persons who are 62 or older or
- It houses at least one person who is 55 or older in at least 80 percent of the occupied units, and adheres to a policy that demonstrates intent to house persons who are 55 or older.

Therefore, housing that satisfies the legal definition of senior housing or housing for older persons described above, can legally exclude families with children.

<http://www.hud.gov/offices/fheo/seniors/index.cfm>

## **Background**

In April 2008, questions arose with both the Senior Citizen Commission and Social Services Commission related to the process for defining and planning for future housing needs. In an effort to provide assistance to the Planning Commission and City Council in their review of senior housing and other special needs housing projects, staff recommended that the Commissions work collectively on the creation of housing project guidelines. Ideally these guidelines would be created and supported by both Commissions as a tool for future project applicants as they form their project proposals. The guidelines would also assist the Planning Commission and City Council as they review formal planning applications. These guidelines are to be geared towards the housing needs of seniors and other special needs groups, particularly the specialized details that are not otherwise addressed by City policies and procedures.

In June 2008, both Commissions began joint discussions on developing General Housing Guidelines and Age-Restricted/Special Needs Housing Guidelines. The General Housing Guidelines were identified as a way to promote options for seniors and persons with special needs within unrestricted housing developments. The Age-Restricted/Special Needs Housing Guidelines were agreed to as a method for communicating specific needs of senior and other special needs populations in housing projects geared towards a specific group. Both Commissions agreed to further discuss the guidelines at their respective meetings, and to further exchange and define more specific guidelines prior to referral to City Council for review. On the following page is a summary of the general categories for future discussion brought up by both Commissions at the Joint Meeting of the Commissions in June.

## **Discussion Areas**

### General Housing Guidelines

- Accessibility
- Transportation fund to support a transportation network (city wide)
- Evaluation of fiscal impact of housing on City services
- Affordability
- Senior + special needs housing

### Age-Restricted Housing Guidelines

- Fiscal impacts
- Affordability
- Skilled nursing
- Assisted-living options
- Supportive services in housing projects
- Market study/justification
- Opportunity for downsizing
- Creative options—further study of what other cities have done

Questions

- Affordability
- Investors—role in affecting stock of housing
- City costs

In an effort to assist the Commissions with the formulation of guidelines, staff began drafting some suggested guidelines and a format for the Commissions to review and modify as a starting point at their July meetings. At the July 10, 2008 meeting of the Senior Citizens Commission (SCC), Vice Chair Elaine Musser also presented some draft guidelines for discussion. After review of both sets of guidelines together, including combining and adjusting them to form an additional set of guidelines, the SCC directed Vice Chair Elaine Musser and Chair Romeo Favreau to work with staff on finalizing draft guidelines for the SCC's review in September. Staff had prepared a set of guidelines that combined its initial draft with the additional information provided by the SCC relative to seniors and special needs housing. At the July 2008 meeting, the Social Services Commission (SSC) appointed Chair L. Frerichs and Vice Chair V. Robinson as its subcommittee to work with the SCC subcommittee on finishing the guidelines.

On September 3, 2008, members of the subcommittee from the Senior Citizens Commission reviewed the combined draft of the guidelines and made additional comments and suggested changes to staff. Both members of the Social Services Commission were unable to attend due to unexpected work demands. Comments from the SCC subcommittee members were drafted into additional language that was incorporated into the housing guidelines. After the SCC's afternoon meeting on September 11, 2008, staff updated the guidelines again to include the SCC's most recent additions. Then the Social Services Commission reviewed the guidelines at their September 28, 2008 meeting and incorporated additional changes. The SSC and SCC have been making revisions and sharing them since that time. In November 2008, the SSC took action to refer the guidelines to their ADA Subcommittee for review and feedback.

**Attachment 2**

**Existing Senior Housing Units in Davis**

**Existing Senior Housing Units in Davis  
November 2009**

COMPLEX Address	CATEGORIES (USED BY ASHA) Dwelling Units / Equivalents	# OF UNITS Type	COST OF HOUSING # in Income Category	AGE RESTRICTION Ages of Residents	WAITLIST Wait Time
<b>1 - Atria Covell Gardens</b> 1111 Alvarado Ave.	<b>78 Independent Living,</b> <b>78 Assisted Living</b>	<b>156 market assisted-living</b>	info not available	<b>62+</b>	info not available
<b>2 - Courtyard Health Care Center</b> 1850 E. 8 <sup>th</sup> Street	<b>38 Skilled Nursing</b>	<b>112 beds</b> 91 skilled nursing beds 21 secured Alzheimer beds	<b>\$167 or \$234/day</b> private room vs. two beds per room*	<b>no restriction</b> most residents are over 80 yrs	<b>not at this time</b>
<b>3 - Davisville Apartments</b> 1221 Kennedy Place	<b>70 Subsidized Senior Apartments</b>	<b>70 affordable rental</b> 18 two bedroom units 52 one bedroom units	<b>\$5 to \$986/mo</b> (30% of income) extremely low, very low and low income persons/households	<b>62+</b> 5 under 55 years* 15 at 55-69 years 35 at 70-79 years 20 at 80+	<b>yes – 23</b>
<b>4 - Eleanor Roosevelt Circle</b> 675 Cantrill Drive	<b>60 Subsidized Senior Apartments</b>	<b>60 affordable rental</b> (all one bedroom units with similar square footage and floor plan)	<b>\$275 to \$975/mo</b> 21 units at 25% AMI* 15 units at 50% AMI 13 units at 60% AMI 10 units at 120% AMI*	<b>62+</b> 20 at 80+ years remainder 62-79 years	<b>yes – 35</b> 25 for 25% 10 for 50% to 60%
<b>5 - Glacier Circle Senior Community</b> 2358 Glacier Place	<b>8 Active Adult Residences</b>	<b>8 market ownership</b> 6 one-story units 2 two-story units	<b>\$325,000 to \$452,000</b> (range of last 3 sales)	<b>no restriction</b> 78 to 93 years old (only 1 or 2 under 80)	<b>yes – 8*</b>
<b>6 - Kings &amp; Queens</b> 801 E. 8 <sup>th</sup> Street	<b>31 Market Rate Senior Apartments</b>	<b>31 market rental</b> (all one bedroom units)	<b>\$675/mo</b>	<b>no restriction</b>	<b>no</b>
<b>7 - Olympic Cottages</b> 1707 Olympic Drive	<b>12 Subsidized Senior Apartments,</b> <b>18 Active Adult Residences</b>	<b>12 affordable rental</b> 11 one bedroom units 1 two bedroom unit <b>18 market ownership</b> (info not available)	<b>\$553 to \$719/mo</b> 10 units at 80% AMI 2 units at 50% AMI <b>\$240,000 to \$254,500</b> (2 sales & 1 listing)	<b>62+</b> 4 at 80+ years remainder 65-79 years	<b>yes – 30*</b> 2-3 years
<b>8 - Rancho Yolo Mobile Home Park</b> 620 Pole Line Road	<b>262 Active Adult Residences</b>	<b>262 market ownership</b> (on leased spaces)	<b>\$20,000 to \$108,500</b> (average rent \$530/mo)*	<b>55+</b> 10% at 55 – 69 years 75% at 70 – 79 years 15% at 80+ years	<b>no</b>

<b>9 - Shasta Point Retirement Community</b> 1501 Shasta Drive	<b>67 Subsidized Senior Apartments</b>	<b>67 affordable rental</b> (all one bedroom units with similar square footage and floor plan)	<b>HUD value \$432/mo</b> (rent depends on income)	<b>62+</b> one third at 55 – 69 majority at 70 – 79 handful at 80+	<b>yes – 16</b> 12-18 months
<b>10 - Sierra Health Care Skilled Nursing</b> 715 Pole Line Road	<b>38 Skilled Nursing</b>	<b>115 beds*</b> 2 & 3 beds per room majority are 2 beds per room	<b>\$190/day</b>	<b>no restriction</b> most are between 65 and 80 years old	<b>no</b>
<b>11 - University Retirement Community</b> 1515 Shasta Drive	<b>213 Independent Living (includes 17 approved)</b> <b>67 Continuing Care Retirement Community</b>	<b>213 rental apartments*</b> (w/ contract and fee) <b>51 nursing beds</b> <b>30 assisted-living units*</b> <b>60 assisted-living beds</b>	<b>\$2577 to \$4667/mo</b> (independent living) <b>\$174 to \$234/day</b> (skilled nursing) <b>\$3869 to \$7299/mo</b> (assisted living)	<b>60+</b> average age for independent living is 80* (vast majority of other units and beds are 80+)	<b>yes – 150</b> 6 months (independent only) <b>yes</b> (no info)*
<b>12 - Villa Calabria</b> 2537 E. 8 <sup>th</sup> Street	<b>6 Subsidized Senior Apartments</b>	<b>6 affordable rental</b> 2 one bedroom units 4 two bedroom units	<b>\$413 to \$785/mo</b> 3 units at 50% AMI 3 units at 60% AMI	<b>62+</b> 1 at 55 – 69 years 3 at 70 – 79 years 4 at 80+ years	<b>yes – 20</b> 4 years
<b>13 - Walnut Terrace Apartments</b> 3101 5 <sup>th</sup> Street	<b>30 Subsidized Senior Apartments</b>	<b>30 affordable rental</b> (50% or 80% AMI) 24 one bedroom units 6 two bedroom units	<b>\$515 or \$633</b> (one bedroom) <b>\$616 or \$730</b> (two bedroom)	<b>62+</b> 80% are under 80 years	<b>yes – 30</b> (6 to 12 months or longer)
<b>14 - Willow Glen</b> 310 Becerra Way	<b>12 Subsidized Senior Apartments</b>	<b>12 affordable rental</b> 11 two bedroom units 1 one bedroom unit	<b>\$382 to \$771</b> 8 units at 50% AMI 4 units at 60% AMI	<b>62+</b> 6 at 55 – 69 years 10 at 70 – 79 years 2 at 80+ years	<b>yes – 25</b> 6 – 24 months

**Summary of categories of units column (categories used by American Senior Housing Association):**

- 67 Continuing care retirement community
- 291 Independent living (with limited services) (includes 17 approved)
- 78 Assisted living
- 257 Subsidized senior apartments
- 31 Market rate senior apartments (without services)
- 288 Active adult residences
- 1,012 Total of categories above

**Other category**

- 76 Skilled nursing

**Summary of type of units column:**

Total market rental units: 244 units (includes 17 approved)

Total market assisted living: 186 units, 60 assisted-living beds and 278 nursing beds

Total affordable rental units: 257 units

Total ownership units: 288 units

Total number of senior units: 1,088 units (=958 units plus 113 equivalent units consisting of 338 beds divided by 3).

**The information in the above table is approximate including a rough estimate of the ages of residents.**

\*Notes\* The following notes are based on phone conversations with management of the senior housing complexes.

**Courtyard Health Care Center** has a total of four private rooms. One of the private rooms is in the secured Alzheimer's and dementia unit and the other three are skilled nursing beds.

**Davisville Apartments** has 5 residents younger than 62 years old who are qualified to live there because they are on Supplemental Security Income. S.S.I. is a federal income supplement program to help aged, blind or disabled people who have little or no income to meet basic needs such as food, clothing and shelter.

**Eleanor Roosevelt Circle** has difficulty filling the 10 units designated for those at 120% of AMI. The reason stated is many of the people who spend that much want access to more services and the linoleum floors installed for accessibility are undesirable for some people. At this time they are only able to fill 6 of the 10 units at 120% and they rent the remainder to seniors at 60% of median income which is the next tier of affordability the complex offers. On a separate note, chronic or mental health issues qualify people for the 21 units designated for those at 25% area median income.

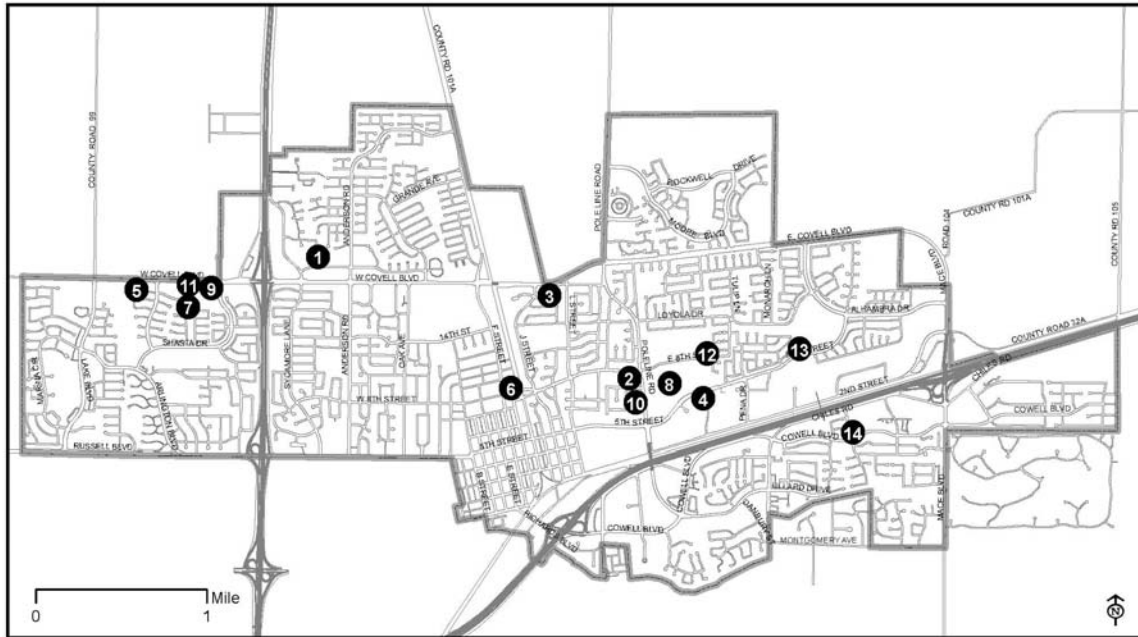
**Glacier Circle** is a tight knit community-oriented senior living environment with a Covenant (formal agreement between the residents to respect each other, etc), weekly meetings and group decision making process. Glacier Circle residents have a right of first refusal on the sale of a property which is used for selecting buyers and establishing the waiting list.

**Olympic Cottages** waitlist takes approximate 2 or 3 years for the rental units and is comprised of almost all women.

**Rancho Yolo Mobile Home Park** monthly rent for the spaces includes City utilities (water, sewer & garbage).

**Sierra Health Care Skilled Nursing** offers sub-acute rehabilitation services. Sierra Health is not a typical convalescent home in that 78% of the residents are rehabilitated and discharged to lower level care facilities or back to their homes. Injury, stroke and surgery are examples of what sub-acute rehab services are for. Acute rehab services are provided at the hospital.

**University Retirement Community** has a current project underway to construct 11 new independent units and 6 new assisted living units which are not included in the in the table. There are waiting lists for all types of units and beds at URC but no further information was available for any units or beds except the independent living units as noted in the table. The average age of women is 79 and the average age of men is 81 in the independent living units.



Map of Existing Senior Housing Units in Davis  
(See Table)