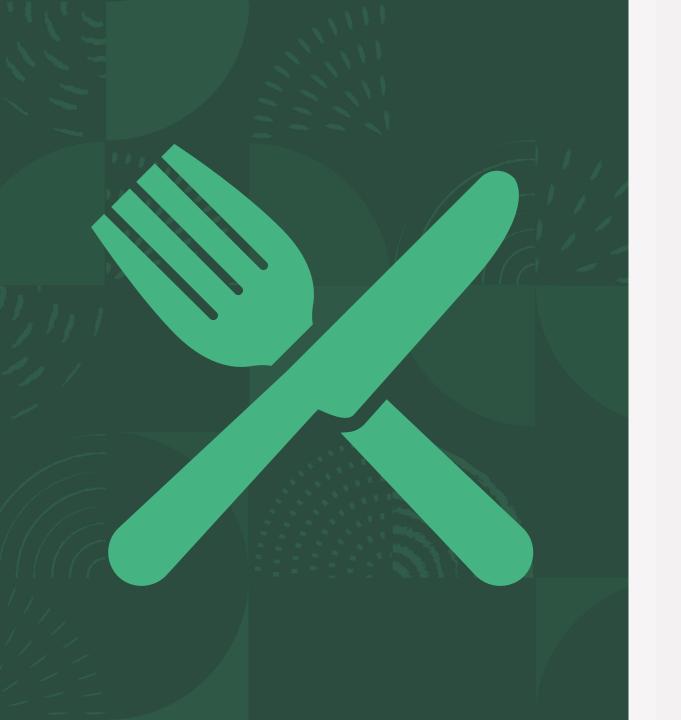
Welcome Chevron Retirees Association of Marin!

- AGENDA
- Welcome -- Des King, Marin CRA President
- Break for lunch
- Panel Presentation: Senior Living Facilities in Marin
- Q&A with Panel
- Next Luncheon Wednesday, August 9





Break for Lunch

Senior Living Facilities in Marin



Today's Agenda

- Types and characteristics of senior living facilities
- Examples of facilities available in Marin
- Why might someone consider moving into a senior living facility
- Panel discussion:
 - Jim Tighe -- Introduction
 - Kirk Beales (Villa Marin resident)
 - Russ Wilbert (Smith Ranch Homes resident)
 - Phil Fisher (his Mom's experience)
 - The Tamalpais Marin (brief overview by Jim Tighe)
- Q&A with Panel

Types of Senior Living Facilities

- Independent Living
- Assisted Living
- Skilled Nursing Facility
- Memory Care
- Life Plan Community*

*Also known as Continuing Care Retirement Community, or CCRC

What is Independent Living?

- For seniors who can still live independently
- Residents have their own dwelling spaces and access to common areas to gather with other residents
- Features and amenities similar to those of a typical small home, townhouse or apartment
- Common areas often include dining, fitness centers, pools, libraries, gaming areas
- Wide range of activities, events and social opportunities
- Some meals and housekeeping included as part of monthly fee

What is Assisted Living?

- For seniors who need some assistance with activities of daily living (ADLs), such as bathing and dressing
- Staff members, including at least one medical professional, are on call 24/7 in most residences
- Typically does not provide intensive hands-on care or skilled nursing care for those with serious mental or physical ailments

What is a Skilled Nursing Facility?

- A form of assisted living typically involving skilled nursing services
- More of a clinical environment
- Residents typically live in a private or semiprivate room without a living room or kitchen

What is Memory Care?

- A type of long-term care for those living with
 Alzheimer's disease or other form of dementia
- Require a higher level of support than what is offered in assisted living
- For those with advanced dementia that make it unsafe to remain at home or without supervision
- Designed to protect residents against wandering and self-harm

What is a Life Plan Community?

- Senior living community
- Tiered lifestyle and healthcare options all on one campus
- Includes independent living, assisted living, skilled nursing and rehab (perhaps even memory care)
- Offers active lifestyle options through a wide variety of activities, events, services and amenities

Senior Living Facilities in Marin

NAME	Buy or Rent	Life Plan Community	Independent Living	Assisted Living	Skilled Nursing	Memory Care
Villa Marin	Buy	~	~	~	✓	
Smith Ranch Homes	Buy		~			
The Tamalpais Marin	Buy-in/ Rent	~	~	~	~	~
The Redwoods	Rent		~	✓	✓	✓
Deer Park Retirement Community	Rent		~			
Oakmont of San Rafael	Rent		~	✓		✓
Springfield Place	Rent		~	~		~
Varenna at Fountaingrove	Rent		✓	✓		~
Aegis Living	Rent		~	~		~
Drake Terrace	Rent		✓	✓		✓
Aldersley Retirement Community	Rent		✓	~	~	~
Windchime	Rent			✓		✓

Sample Facility Costs (Independent Living)

Facility	Entry Fee	Month	Meals	
		One BR, single	Two BR, double	
		occupancy	occupancy	
Villa Marin	Condo purchase	\$4,400	\$9,000	One meal per day
Smith Ranch	Condo purchase	\$3,800	\$5,000	Optional 20 fine dining meals per month for \$1000 per person
The Tamalpais	\$118K - \$571K	\$6,640	\$11,669	Included
The Redwoods	\$7,500	\$5,060	\$7,580	\$14 per meal
Oakmont San Rafael	None	\$7,495	\$11,445	Included
Sonoma Hills	\$4,000	\$4,000	\$5,000	Included
Valley Orchards Petaluma	\$1,950	\$3870	\$5,170	Included

First Panelist:

Kirk Beales (Villa Marin Resident)



Personal Experience & Observations

- When you should consider a senior living facility and why
- Our experience
- Admission process
- Costs and fees and what you get
- Other observations

Villa Marin

- A "Life Plan Community"
- Located at 100 Thorndale, San Rafael (near Northgate)
- 224 condos, owned (not rented) by residents
- Studio, one-bedroom, and two-bedroom units
- Currently about 40 empty units
- Currently about 200 residents, room for about 375

Villa Marin







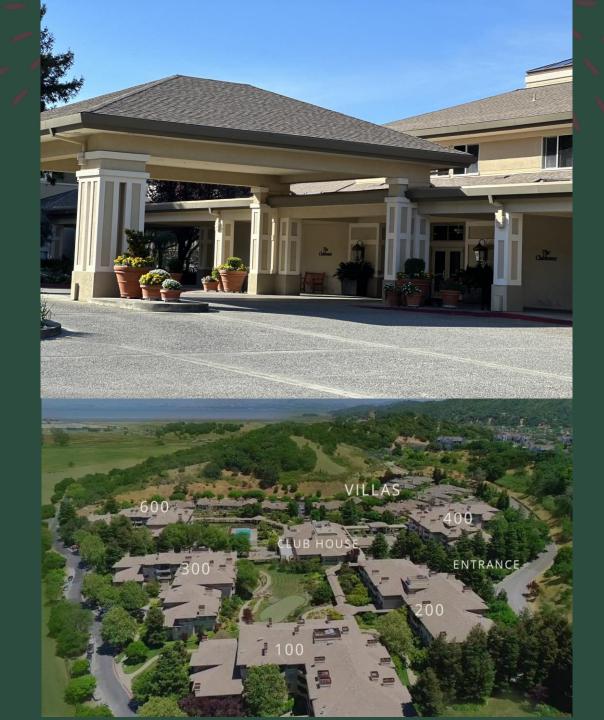






Second Panelist:

Russ Wilbert (Smith Ranch Homes Resident)



- Homeowners condo association 24 villas and 219 condos on 30 acres near McInnis Park
- About 290 residents independent living with no medical personnel
 some residents have caregivers
- Home prices: \$550,000 for 1 BR, up to \$2.5 million for Villas
- Homeowner assessment for admin, maintenance, utilities, housekeeping, valet, etc. -- \$2,600/mo for 750 sf, up to \$4500 for 2400 sf
- Dining room assessment of \$1000 per person per month for 20 fine dining rooms meals and continental breakfast; lunch in grill room and outdoor patio costs \$12.50

- Large clubhouse with a lounge, bar, grand piano, large dining room, wine cabinet and library
- Lower floor has a large central lobby, grill room, card room, community room, mail room, exercise room, lockers, multipurpose room, boutique, hair salon, and office space
- Manicured landscaping with walking paths, big outdoor pool, hot tub, 9-hole putting course, croquet, bocce court, resident garden boxes
- Underground parking with EV charging -- each home has a separate storage area

















Third Panelist:

Phil Fisher

- Explain "Activities of Daily Living (ADLs)" and how are they used
- Share personal experience with moving his Mom into an assisted living facility

Activities of Daily Living (ADLs)

- Ambulating: To move about freely and safely
- Feeding: To feed oneself
- Dressing: To assemble an outfit and put on clothes properly
- Personal Hygiene: To manage aspects of personal hygiene, such as bathing, grooming, and brushing teeth
- Continence: To control both bladder and bowel movements
- Toileting: To get to and from restroom, use the restroom properly, and clean self properly

Choosing Assisted Living

- Walk around- Are facilities clean? Attractive? Odor free?
- Ask residents, visiting adult children- What is good/not good?
- Ask management:
 - Staff/resident ratio, if/when nurse on duty
 - Reception desk hours
 - How meds are handled, can staff do injections?
 - Monthly fees vs ADL score
 - Organized Activities: Games? Visiting Musicians, Lectures, etc.?
 - Van service available?
 - Beauty parlor/Haircuts available in house?

The Tamalpais Marin

Jim Tighe



The Tamalpais Marin

- A "Life Plan Community"
- Located at 501 Via Casitas, Greenbrae (near Bon Air Center)
- All rental units (not owned) -- studios, junior 1 BR, 1 BR, 2 BR
- Must be age 65+ and capable of independent living to enter
- About 300 residents, including independent, assisted living and skilled nursing
- Entry fee = \$118K (one person, studio) up to \$571K (two-person, 2 BR)
- Monthly fee =\$5200 \$11,700 -- includes 3 meals per day* per person
 - *Alternative one meal per day plan available

The Tamalpais Marin Services & Amenities

- Full service dining with carry-out and flexible meal options
- Housekeeping, laundry
- Fitness center, wellness classes, access to hiking trails
- Indoor pool and spa
- Library, arts & crafts, billiards, bocce ball, gardening
- Transportation to shopping, special events and San Francisco
- Life Care Continuum -- onsite physicians, clinic, skilled nursing facility, rehab therapy

The Tamalpais Marin









The Tamalpais Marin









Q&A Session

Note: This Powerpoint presentation, the handout at your table, and related reference documents, are available at www.MarinCRA.com

Next Meeting of Marin CRA:

11:00 am, Wed, August 9
McInnis Park Club Restaurant

Guest Speaker:

Chris Jablonski,

Chevron Vice President, Downstream Technology & Services

