

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 semi-private 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	Monthly Fee		Meals
		One BR, single occupancy	Two BR, double 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)***



Smith Ranch Homes

- **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**

Smith Ranch Homes

- **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, multi-purpose 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**

Smith Ranch Homes



Smith Ranch Homes





**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***

