

Central Complex Committee Final Report

September 27, 2021

Project Summary

Since 2012, the question of what to do with the Central Complex (*Attachment A*) has been an agenda item for the Board of Directors (Board) of the Oakmont Village Association (OVA). Although studies, surveys and architect renderings have been done, little or no action has been taken for a variety of reasons, including Board changeover and a lack of consensus among the Board and the residents.

In 2019, the Long Range Planning Committee collated several years of surveys and information and with the Board, held a Town Hall Meeting called the Future of Oakmont. The PowerPoint that was presented at that meeting, “What We Heard From Oakmont” (*Attachment B*) made a final recommendation to the Board to “hire a community architect to create a vision of our future community that would include a baseline vision to meet essential needs and an enhanced vision of what might reasonably be possible.”

In May, 2020, the OVA Board voted to establish the Central Complex Committee (CCC) to:

“Explore development concepts by early 2021 for the Oakmont Central Area that will provide active lifestyle opportunities that will benefit current and future Oakmont residents. Overriding priorities will be to maximize the livability, accessibility and safety of the property in ways that are technologically, environmentally and financially sound. This will be a collaborative effort that is assisted by design professionals skilled in community planning, the on-going input from residents of Oakmont, the City of Santa Rosa and other community stakeholders. The purpose of the Committee is to develop “different but doable” scenarios, assess them, and prepare recommendations, not to create construction documents or initiate any work.”

In July 2020, the CCC began monthly meetings to continue data collection. The goal was to put together a proposal seeking input from the Sustainable Design Assessment Team (SDAT) of the American Institute of Architects (AIA) that would consider development alternatives for the Oakmont Village Central Complex. The Complex comprises approximately 6 to 7 acres of land that includes the Berger Center, the Central Activities Area (CAC), the Central Pool (with cabana), the Maintenance Building, the Village Administrative Center (in leased space), the Lawn Bowling Center, greensward and adjacent parking lots and landscaped area (*Attachment A*).

The engagement of SDAT would involve utilizing a nationally acclaimed Communities by Design Program that brings together architects, community planners and other professional disciplines to “work alongside residents and other key stakeholder groups to help Oakmont create a broader vision of what could be possible in Oakmont’s future

particularly if the plan included: (1) adjacent commercial and business properties (not owned by OVA - *Attachment C*); and, (2) OVA-owned undeveloped parcels (*Attachment D*).

Beginning in January, 2021, several members of the CCC and Mitch Conner of ArchiLOGIX began meetings with the AIA Communities by Design team. Because of COVID, the SDAT program had been put on hold. In addition, there were many other communities that had been approved but could not be implemented. Rather than wait several years to formally apply, AIA offered a process that would have included a Zoom meeting kick-off to introduce the AIA members, a lifestyle survey of all Oakmont residents, a second meeting to discuss the survey results and a review of any plans.

The meetings with AIA continued for several months until it became clear to everyone that the development of a community-embraced plan required a more hands-on approach than the AIA could offer for several years. Rather than wait, it was decided that the CCC would become a subcommittee of the Long Range Planning Committee that would continue with the scope of work as outlined by the Board under the new name of **Oakmont 2030**. In July, two community organization companies were interviewed to take the place of the AIA; Gervais & Associates from Windsor was selected.

Although the plan below was originally written for the AIA following their SDAT proposal format, it now serves as the final report of the work of the CCC and as a framework for **Oakmont 2030**. It is the belief of the many people who have been a part of this effort that a new process is needed to move Oakmont forward in the discussions about how best to both meet the needs of current members as we age in place and to ensure that our community attracts and welcomes new, younger retirees. It is our hope that the work of **Oakmont 2030** will guide future OVA Boards, members and staff in making forward-thinking decisions for years to come.

Brief Community Description

Oakmont is an active living community for residents aged 55 and older, located on Scenic Highway 12 in the Sonoma Valley and within the city of Santa Rosa. It offers seniors access to over 170 clubs, two golf courses, three swimming pools, pickleball, tennis, bocce, petanque, horseshoes, lawn bowling and shuffleboard courts and numerous organized outdoor and indoor activities. Activities that offer opportunities for physical, intellectual, and social interaction are vitally important for seniors wanting to maintain personal relationships throughout all phases of aging. Awareness of the limited capacity of existing facilities to meet the recreational, intellectual, and social needs of residents is at the heart of community interest in expanding and modernizing the Oakmont Central Complex.

History

The property that is now Oakmont is the former site of Annadel Farms where Samuel Hutchinson, and later Joe Coney, raised livestock, built a cheese factory and grew hops. In 1963, the land was annexed by Santa Rosa and purchased by Sacramento Valley developer, H. N. "Nor" Berger who proposed building 600 homes. It was his vision to create a new type of place where postwar retirees could get away from congested suburbs and live an active lifestyle in a more rural landscape. The first home sold on July 31, 1964.

Although the project was to be built in stages, Frances and Nor Berger worked with Ted Robinson, a leading golf course designer, and top architectural firms to map out every street, cul de sac, circle and dwelling. By 1980, most of the project was completed and Berger, looking forward to retirement, struck a deal with the Gallaher Group of Santa Rosa to complete Oakmont.

Part of the sales contract gave Gallaher ownership of the golf course if Oakmont residents turned down their right of first refusal to buy it. Although the residents rejected the proposed \$1500 per household assessment in 1989, a long series of lawsuits kept ownership in limbo until 1991 when the title was transferred to Oakmont Golf Courses, an entity partially owned by 863 resident members. In 2019, the course experienced financial hardship, but this time the residents voted overwhelmingly (by the largest margin in Oakmont history) to purchase the land and buildings.

Oakmont Gardens, a senior living facility offering both independent and assisted living, was developed by Dr. Thomas Torgenson of Santa Rosa and Hume Thomason of Newport Beach in 1985, opening its doors in 1987. When the Oakmont Gardens investors approached H. N. Berger to purchase the land they were turned down because Berger wanted to control the property and instead, a 99-year lease was signed.

Population Figures

Oakmont is an active senior community of approximately 1,500 acres with about 3,200 residences and roughly 4,720 residents that includes 163 independent and assisted living rental apartments at Oakmont Gardens.

Demographics

A 2010 demographic study (*Attachment E*) shows that Oakmont is home to residents with a median age of 76. Sixty-one percent of the residents are female and 39% male. About 20% are "Baby Boomers," while less than 2% of the residents under 50. Only 2.1% are Hispanic and 2.7% of the residents are non-white.

About 67% of the men are married, but only 43% of the women are married, the majority being either widowed or divorced. As Oakmont residents age, a significant

difference develops between the men and the women with two-thirds of women in Oakmont over 85 years old being widows.

Single women make up almost 80% of the 55-59 age group and are the largest group of newcomers to the community.

About 77% of the homes in Oakmont are owner-occupied, a number that includes Oakmont Gardens. Most owner-occupied and renter-occupied homes and apartments have single occupants.

Future changes in the Oakmont median age of 76 are expected to take place slowly because the housing turnover rates are low. In 2014, the median tenure in that home is 12 years for owner-occupied houses and 8 years for renter-occupied homes.

Economic Information

The population of Oakmont is solidly middle class with an estimated median household income was \$56,000 and the average was \$75,000. Married couple households average over twice the income of persons living alone -- \$87,154 vs \$39,441.

About 40% of the married couple families had a 2010 income over \$100,000, and 10% of them had incomes over \$200,000. On the other hand, it appears that approximately one quarter of the single residents are living on less than \$25,000 per year. Thus, while the average Oakmont household income is \$75,000, there are many who are not as financially stable. Most Oakmont households receive both Social Security and a pension or retirement savings. These statistics are also available in *Attachment E*.

For many years, the OVA received money from developers for each home built. The final build-out of homes in 2014 dried up that source of revenue and surprisingly, there were no plans from the Board about how to replace it. Recently the Board investigated the possibility of levying a fee on real estate transfers but found that not to be a legal option in California.

As a result, OVA relies totally on dues from residents to meet its operational expenses. Following the purchase of the golf course, the monthly household dues are \$102 per person per month. With few exceptions, former Boards of the OVA have delayed tackling projects that cost money and 'kicked the Californian down the road' rather than raising member dues.

Form of Local Government

The OVA is governed by a seven-member volunteer Board of Directors that are elected to fill two-year staggered terms. The Board's mission is to "provide OVA members with athletic, recreational and club facilities to enhance the quality and enjoyment of their Oakmont residence, and to have Oakmont perceived as a premier active adult retirement community in comparison with other similar retirement locations, thereby

contributing to the well-being of the residents and to the preservation of property values.”

OVA is managed by a General Manager and seven administrative staff members including a three-person Architecture Committee staff. The maintenance team is composed of ten people. The OVA is a California non-profit organization that operates under the requirements of the California Davis-Stirling Act.

Some of Oakmont is also divided into 34 sub-HOAs that adds another layer of governance and cost to individuals. Ranging from a triplex to 94 units in size, these sub-HOAs have a board of directors and budgets and are tasked with protecting common areas including managing landscaping services, maintaining exteriors, providing insurance for the structures and complying with state and local codes. Some sub-HOAs are responsible for providing water for the homes and for irrigation. Sub-HOA dues range from approximately \$137 to \$300, monthly. In general, sub-HOAs work with and comply with the OVA Architectural Office.

Important Project or Contextual Information

The CCC was composed of members of the Oakmont Building Construction Committee (BCC), the Long Range Planning Committee, the Oakmont Community Development Committee (OCDC), the Board of Directors (BOD) in addition to OVA’s General Manager and Maintenance Manager. (A list of members follows.) As part of its formation in May 2020, the BOD requested four principal areas of activity.

- Exploration into the possibility of engaging an American Institute of Architects "Design Assistance Team" to contribute to assessing opportunities that could take a broader view, including properties in central Oakmont outside of OVA control
- Engagement of architectural services from ArchiLOGIX to provide high-level facility and site planning services, as well as related assistance
- Documentation and descriptions of multiple realistic future configurations of the Oakmont central area
- Development of high-level, credible data, including cost ranges, supporting possible changes in the central Oakmont complex

Regional Setting and Influences

Oakmont is located 70 miles northwest of San Francisco, a one-hour plus drive from airports, museums and culture of a major metropolitan area. It sits at the northwest entrance of Highway 12, a scenic road through to Sonoma Valley, home to over 425 wineries.

Oakmont is a desirable place to live. Resident surveys by the Long Range Planning Committee found that the three most important reasons for deciding to move to Oakmont were the natural beauty of the location, the wide variety of activities and

opportunities to meet socially, and the proximity to family members. Other factors listed as important were safety, association amenities, and weather. New resident surveys continue to echo these themes.

Oakmont is located in an Urban Wilderness Interface zone, situated between the Mayacama mountains including Mount Hood and Sugarloaf on one side and the Trione-Annadel Park on the other. While the beauty of these mountains is a major draw for residents, recent years have brought repeated Public Safety power outages and wildfires that have destroyed homes and property in Oakmont.

Oakmont is located within the city limits of Santa Rosa and therefore subject to city building and zoning codes.

Past and/or Ongoing Planning Efforts

In 2007, the CAC was built at a cost of \$2.5M. Originally meant to be large enough to include space for the OVA office that would also serve as a welcome center for prospective buyers, the building was scaled back considerably, a decision many think to have been a mistake.

In 2014 - 2015, the Berger Improvement Committee met and did detailed studies of the building but did not finalize plans. Later, in 2018, the Building Action Committee turned its sights to the Berger Center developing three plans that were presented to residents. Based on high-level projections the Board at that time selected an option for minimal Berger Center remodeling to start in a couple years. Because of other priorities, subsequent boards have taken action on seismic upgrades, new flooring and other cosmetic updates.

Ideas ranged from:

- Remodeling the existing Berger
- Demolishing the existing building and replacing it with a new building
- Repurposing the Berger and replacing it with a new building

Attachment F shows the various options for the Berger with cost ranging from \$3.6M to \$5.1M in 2018 dollars.

In December, 2020, a meeting was held with representatives from the CAC building committee, the Berger Improvement Committee, and the Berger Action Committee to discuss the successes and failures of these three initiatives.

Several important points were made:

1. Board turnover was by far and away, the most important reason given for why Berger projects were derailed. Everyone agreed that this plan must be a master plan that will bind the board and be rolled out in phases.

2. Money. While the CAC building was built, it was considerably scaled back from the original concept designs. As a result, the space for the OVA administrative building was eliminated from the plan. Money is also at the heart of the debate about the Berger. One side argues that the Berger has 'good bones' and could be remodeled to meet people's needs for less than a new building. The other side argues that the cost of remodeling will be significant and that for just a 'few dollars more' a new building could be built.
3. A lot of research has been done by these committees that will be valuable going forward.
4. There was less controversy with the CAC project because almost everything that was being built was associated with meeting the needs of a large constituency - like the gym, library and card rooms. As a result, there was immediate and broad support. Most efforts for the Berger have focused more on what the facility should look like instead of who we are serving and whose needs are being met.
5. The types of rooms that are needed should be defined.
6. The issue of required parking remains a crucial consideration.

In 2019, the OVA bought the golf course and entered into an agreement with a golf course management company (now CourseCo) that includes a provision that will allow the OVA to use part of the land now occupied by the 3rd and 4th holes of the West Course, reimbursing CourseCo for lost revenue during the construction.

Problem Statement and Issues Analysis

To ask what the Central area of Oakmont should look like in the future means creating a common vision of the opportunities and services that it should or could provide for residents. It is the development of a place that is a magnet for socializing, entertaining, learning, playing games or exercising while satisfying the overwhelming desire of residents who want to maintain Oakmont's small town feel.

What is needed is a roadmap that looks at key demographic factors and creates, over time, a plan that offers businesses, gathering places and other amenities that specifically meet the needs of the broad spectrum of seniors who call Oakmont home. An active retirement community demands buildings that provide a broad and flexible range of rooms and spaces. It demands walkable open spaces, sidewalks, benches and gathering places. Oakmont's growing population of single women means greater attention to safety. The increase in people choosing to age in place means designs to ensure accessibility and access to technology. Given the location of Oakmont, the plan must also be firewise and energy independent.

The CCC seeks to engage professionals to help find a way to balance these needs and engage the broader community in a participatory process that will result in the development of a vision and framework that leads to a fiscally responsible and sustainable future for Oakmont. In addition, we seek implementation strategies that will provide steps that can be taken in different timeframes and systems to monitor progress and costs.

Study Area

The specific focus of this proposal is the Central Area Complex that includes the Berger Center, the Central Activity Center, pool/spa, the Maintenance Shop, the Lawn Bowling Green, the OVA Office, and the surrounding parking lots. Except for the Office, it is property that is owned and controlled by the OVA (*Attachment A*).

A broader view includes the best use of the land bordering the CAC including Holes 3 and 4 of the golf course and the commercial property that straddles Oakmont Drive (*See Attachment C*). An even broader view includes the parcels of undeveloped land that are owned by the OVA or border Oakmont and could be purchased by OVA, specifically the former water treatment plant (*Attachment D*).

Barriers to Success

There are six major barriers to success.

1. Parking

Parking is at a premium and any work on the Berger that increases seating capacity will trigger new parking requirements, for which the city of Santa Rosa has already put OVA on notice. It may be possible that this section of Oakmont could be rezoned to a “downtown” status that would reduce the requirement. Interestingly, in October of 2020, the city of Santa Rosa updated some design and zoning rules, specifically lifting caps on building height and eliminating parking requirements, so that a 720-acre plan for downtown could be developed. It is unclear what that could mean for Oakmont.

There are many other options that have been or could be explored.

2. Need for Local Participation by Many Stakeholders

Surrounding the Central Complex are approximately 18 acres of privately-held commercial properties (*Attachment C*). Surveys conducted by LRPC in 2019 included conversations with a few of those businesses. In general, store owners were receptive to working on ideas that would enhance the entrance area to Oakmont. If the scope of this project includes these properties, a plan would need to be developed that would energize local merchant cooperation, probably

through increasing traffic to the area. Ideas generated by the LRPC included a medical clinic, a veterinarian and an expanded Oakmont market. Input by residents and property owners will be a part of the wider community plan.

3. Communications to Oakmont Residents is Inadequate

The Communications Committee of Oakmont has worked hard to develop channels that reach all residents. The *Oakmont News* is published twice a month containing OVA news and club notices. On Tuesdays, the OVA publishes an eBlast that contains club events, OVA meetings, special notifications and some outside events or opportunities in Santa Rosa. Special notices are emailed as needed to publicize Town Halls or rulings by the Board. The OVA staff now offers access to Zoom for clubs and sub-HOAs. The OVA website has been recently revamped and is easier to navigate and contains more timely content.

However, many Oakmont residents do not have or do not use smartphones or computers. While the *Oakmont News* goes to every household, it is not uncommon for it to go unread. The eBlast and special notices go to about a third of Oakmont residents. In a project like Oakmont 2030, where community buy-in is critical, new ways of communicating will need to be developed to ensure broad participation, particularly with the COVID shut-down of facilities. In addition, creating a better sense of understanding of this project needs to be done well ahead of time to avoid misunderstanding that would create community dissension before the facts are understood. There are already rumors that this effort is a well-disguised plan to build a multi-million dollar building requiring massive dues increases. While there is no basis in fact, rumors are tough to stop once started.

4. Disagreement Among Residents

Oakmont has a history of divided opinion. When the golf course was first offered to residents in 1989, division among the residents caused picket lines in front of the Berger Center. Opposition to the building of pickle ball courts made national news in 2016 and last year, residents were divided again over the decision to buy the golf course. This same type of dissension resulted in reductions in space during the 2007 building of CAC resulting in a much smaller building than originally planned, a decision that is now regretted by some.

Today, issues like the 2021 elections, revisions to the by-laws and deciding when it is safe to return to OVA facilities after the COVID vaccine, threaten to bring out contentious factions of Oakmont. These arguments are frequently voiced through and magnified by the commentary found on NextDoor Oakmont and the Oakmont Observer.

5. **Money/Dues**

Although a comparison between 30 northern California retirement communities (*Attachment G*) shows that Oakmont dues are below other communities by several hundred dollars per month. Oakmont new resident surveys show that incoming buyers think they are unexpectedly low.

Another consistent argument that is voiced is that there are a large number of residents who cannot afford dues increases. When dues were raised \$23 per person in 2019 to purchase the golf course, the Oakmont Neighbors Together program was launched as a “neighbor-helping-neighbor” effort to generate funds that would be given as donations to help offset the increase. There was almost no interest in the program by Oakmont residents.

However, it is important that Oakmont 2030 addresses the issue of how renovations and improvements at the Central Complex will impact members’ dues. The CCC must examine ways to leverage existing OVA assets to provide additional resources to retire existing debt and pay for new undertakings.

6. **Natural Disasters and PSPS**

The natural beauty of Oakmont comes with a very high price. In 2017, the community was surrounded on three sides by the Nuns fire to the Southeast and the Tubbs fire to the Northwest. In 2020, the Glass Fire crept into Oakmont burning six homes and several miles of fencing along Route 12 (*Attachment H*). Until 2020, the only exit from Oakmont was Route 12 until a second exit onto Channel Drive was opened and successfully used to evacuate residents.

In 2019, there were three (one lengthy) PSPS events in Oakmont. During the outages, the OVA got generators from PG&E to keep the Berger and CAC open for people to use for cell phones or medical needs. A new generator was permanently installed in 2020.

Clearly, Oakmont needs energy independence and although several Committees are working on this, including the recent installation of solar parking canopies panels in the CAC, the West Rec and East Rec parking lots to power the OVA facilities, attention must be given to this item in any proposed plan.

Scope of Issues

There are six major issues that are driving Oakmont’s need to create a different Central Complex solution.

1. **Space - We Are Almost Out of Room**

There are now 170 clubs in Oakmont that are organized and run by volunteers. A recent Club Survey (*Attachment I*) conducted by the LRPC found that since 2003, the Board has approved an average of 10.5 clubs per year. Although approximately 5.1 clubs go inactive each year, there is still a net gain of 5.4 clubs a year.

With a total of 11 meeting rooms, the competition between clubs for space is becoming intense. Some clubs, with recurring events like Lifelong Learning, book their space years in advance. OVA scheduling staff reports that prior to the COVID shutdown, it was becoming exceedingly difficult to meet the demand and estimates a hard limit of 180 clubs.

The Club Survey showed that 23.4% said that reserving space is a problem and 14.3% say that the size of the space they are currently using is not meeting their needs. Particularly hard hit are the clubs with memberships greater than 20.

Adding pressure to the need for space is the finding that almost 50% of the clubs of all sizes predict that their membership is likely to grow. And, almost 40% of the clubs say that they would like to advertise outside of Oakmont to attract new members or attendees at events.

Interestingly, there seems to be a very low level of concern about the lack of space with only 16% expressing any concern with 33% expressing no concern at all. This dichotomy between a possible Board ceiling of the growth of future clubs and the looming lack of space is something that should be communicated to Oakmont residents in order to bring the issue to the forefront.

The Club Survey also discusses the capacity of each of the current meeting spaces and talks about the need for architect input into making space decisions for the future.

Here is a look at each of the buildings in the Central Complex and its specific needs.

The Berger Center

The Berger Center was built in 1964 when there were fewer houses and people. Although 337 seats can be put into the space, fire code limits seating capacity to 280, which is far from the industry standard of 10% of the population or almost 500 residents. Although the Berger is 3,449 square feet, about half of the space is not usable for seating. Storage for clubs is limited, and maintenance equipment is housed in a different building. Twice in early 2020 (before the shutdown in March), there were overflow seating at events in the Berger with attendance exceeding fire code regulations.

The limitations and deficiencies of the Berger have been thoroughly examined and documented by construction, space planning, and musical and acoustical specialists. OVA clubs, staff, and members have provided critical, thoughtful input through surveys and reports about what works/doesn't work about the Berger's layout, access, and utilization. There is agreement in Oakmont that the Berger is due for change. However, there are a wide range of views as to just what should be done.

Two needs compete for this space – first, clubs that require flat flooring for dancing and social events and second, clubs that require auditorium seating and a stage. Should both of those needs be met by two separate buildings that meet the 10% guideline? Or can a single building hold creative and flexible seating alternatives?

The CAC

As reported earlier, the CAC was rebuilt in 2007 after being downsized due to pressure from residents. The project cost was \$3.3M of which \$2.5M was borrowed and paid off in seven years.

The most used room in the CAC is the Fitness Center. It is often overcrowded, and because expansion is not easily achieved, the amount of equipment is restricted and often has people waiting in line.

The library is out of room for books and has no space for displays or meetings, like book clubs. The arts and crafts room has little storage for regular participants so they are required to carry their supplies in and out with them each visit. There is no room dedicated to Oakmont artists that also has storage for art supplies. The Oakmont Technology Center is small, resulting in capping class sizes. The Central Pool area has numerous issues including being ADA non-compliant. The pool cabana is unpermitted and a fire hazard.

OVA Administrative Offices

The OVA administrative offices are located in a building that is being rented. Consideration should be given to what makes the most sense economically over the long-term.

OVA Maintenance Building

Since this building is located in the middle of the Central Complex, a better use of this space should be found. In addition, many of the things in the building are housed there because of insufficient storage space in the Berger.

2. **Optimized Land Use**

Rather than being a cohesive “downtown” like those that exist in other planned senior communities, Oakmont is a patchwork of buildings and owners. The surrounding land consists of 18.42 acres of 48 different land parcels with more than 10 different owners.

Optimizing the use of land will involve the involvement and engagement of a variety of stakeholders including the land owners, businesses, Oakmont Gardens, Annadel Park and CalFire. It will also involve the issue of revenue generation and the need to find ways to generate money for the City, local businesses and Oakmont.

The biggest change, however, is that with the recent purchase of the golf course, Oakmont has access to 205 acres of land. The CCC seeks to develop a plan that will optimize the land use for Oakmont residents in a way that is both environmentally sound and sustainable.

3. **Livability**

Although the Central Complex is a hub of activity, most residents go there for a specific purpose like a class, workout session or game of cards and then leave. Past development efforts did little to conceptualize Oakmont as a ‘village’ with a central magnet that includes green space, walking trails, benches and places for people to meet and socialize.

A major focus of this effort is to create a common vision among residents about what the Central area could provide and what opportunities could be created that would make Oakmont an even more livable and sustainable community. Of particular concern is the need to understand what space needs future generations will want addressed so that Oakmont will continue to attract new homebuyers through the coming decades.

4. **Community Endorsement**

As it stands, *What We Heard From Oakmont* (Attachment B) is a great compilation of the wide range of opinions on the Central Complex and surrounding issues like funding. While there is an overriding sentiment to keep Oakmont’s small town feel, from there the opinions were divided.

“Don’t Change Oakmont,” conflicted with those who said “Our Facilities are Outdated” and “We Don’t Have Enough Space for Our Clubs.”

“We Need to Update/Replace the Berger” conflicted with “I’m Afraid I Won’t be Able to Afford to Live Here” and “We Are Spending Money We Don’t Have.”

Oakmont looks to outside professionals to develop ways to foster a greater sense of community engagement that will bring focus and agreement on a vision and a framework for a detailed roadmap of the future.

5. **Elnoka**

Although outside of the scope of this project, but still important to know about is Elnoka, a proposed senior development located on 69 acres to the northwest end of Oakmont (*Attachment J*).

Many years in the planning process, the recent environmental report raised many questions and concerns that were addressed in a letter to the City of Santa Rosa sent in June of 2021. The impact on Oakmont includes the potential for increased usage of the Oakmont golf courses, increased stress on roads during evacuations and real estate competition against Oakmont, although at this time, Elnoka is proposed to be rental only. The building of Elnoka underscores the need for Oakmont to keep its facilities modernized and competitive.

6. **Current Trends**

The LRPC and CCC have looked into several trends that have relevance for this proposal - Aging in Place and the incoming Gen X residents.

Aging in Place

We are becoming an older society with the number of Americans over 65 expected to more than double by 2060 to nearly 25% of the U.S. population. According to the AARP, 80% of these seniors want to remain in their homes and communities for as long as possible. That groundswell creates different demands on cities and communities like Oakmont. New community models that are aging-in-place-friendly provide a wide range of services and resources that give seniors more options to stay home longer.

While some of these are outside the scope of this proposal, Oakmont has an important opportunity to create a community that better supports aging in place. Studies have shown that neighborhoods with more resources - parks, recreation centers, community centers, libraries - buffer cognitive decline and that environments that promote walkability and sociability are positively linked to better physical health. A redesign of the expanded Central Complex should consider and accommodate these findings.

Other trends include the increasing number of women who are growing old alone. Age-friendly communities are introducing co-housing options, missing middle developments and pocket neighborhoods to meet this

need. For Oakmont, this trend may become increasingly important as the number of single women who own property here increases.

Gen X

Gen X refers to the group of Americans born between 1965 and 1980 who are just beginning to reach the age when they can move into Oakmont. In broad terms, this group has been characterized on the one extreme as “slackers” to, on the other, “self-confident entrepreneurs.” In 2002, *Time* magazine published an article titled *Gen Xers Aren't Slackers After All*, reporting that four out of five new businesses were the work of Gen Xers including Google, Amazon, Wikipedia and YouTube.

They are educated, technologically savvy, working to achieve a life balance. This is the generation that will have parents in Oakmont or who will retire here themselves. Accommodation to the needs of Gen X needs to be a big part of the Oakmont 2030 plan.

Objectives of the Oakmont 2030 Committee

1. To engage the residents and stakeholders of Oakmont in a participatory process that will develop a vision and a framework that leads to a community that will continue to meet the needs of current and future generations.
2. A recommended roadmap for achieving that future over time that will include designs, illustrations, examples and details.
3. Recommended timeframes and strategies for implementation that are flexible in their sequencing.
4. Recommendations for ways to offset project costs through the generation of revenue beyond dues.
5. Recommendations on systems to monitor progress and measure sustainability.

Cost

The cost of this project will be determined by a combination of architectural proposals, community acceptance and construction costs and will be rolled-out incrementally as milestones are met.

To finance the project, Oakmont 2030 seeks to develop a comprehensive set of finance alternatives that have here-to-fore not been explored and that will limit the need to raise membership dues including:

1. Construction loans from interested lenders
2. OVA capital reserves from existing OVA accounts
3. Private Placement or the issuance of bonds by OVA
4. Construction cost offsets, such as rental of the Berger Center to outside groups
5. Possible sale, rental or development of Oakmont-owned property
6. Formation of a not-for-profit to raise money for future development
7. Outside funding sources, such as community or federal grants
8. Partnerships with organizations like AARP looking to fund pilot projects
9. Sponsorships by outside companies or organizations that are Oakmont stakeholders

Steering Committee Information

Marlena Cannon Tremont, Co-Chair is a consultant with 20 years of experience as the president of Cannon Communications, an award-winning integrated marketing communications company representing a broad spectrum of corporate and not-for-profit clients. Specializing in start-ups and turnarounds, her clients included a water-saving plumbing products company, ITW, the YMCA of Lake County, IL and several corporations specializing in products for the golf industry.

Prior to starting her own company, Ms. Cannon was the director of communications for Outboard Marine Corp. during the sale, hostile takeover and subsequent management turnaround of this Fortune 500 company. Earlier in her career, Ms. Cannon served as a Congressional and state lobbyist for AT&T during divestiture, working to legislatively reposition it from a regulated monopoly to a competitive information movement and management company.

Tom Kendrick, Co-Chair is a consultant, educator, and author. He spent 20 years with Hewlett Packard in its Project Management Initiative (PMI) and has over 40 years of worldwide project management experience, including work for Visa Inc, DuPont, General Electric, and as an independent consultant.

Tom retired in 2017 as Program Director for the UC Berkeley Extension Project Management Curriculum. He is the author of ***How to Manage Complex Programs*** (AMACOM, 2016), ***Identifying and Managing Project Risk***, Third Edition (AMACOM, 2015), and three other popular books on project management. Tom regularly conducts classes and presentations on program, project, and risk management.

Tom completed his BSEE at Princeton University, and has his MBA from the Wharton School and an MSEE from the University of Pennsylvania. He is a certified Project Management Professional (PMP) with the Project Management Institute. Tom is a past president of the Silicon Valley PMI Chapter and a frequent volunteer for many local and global PMI activities. Tom is the President of the OVA Board of Directors.

Katy Carrel is a champion in her community. She is an OEPC (Oakmont Emergency Preparedness Committee) Board member, BCC (Building Construction Committee)

member, Central Complex Committee member, Firewise Safety Committee member; and the Oakmont Map Your Neighborhood (MYN) Coordinator.

Katy spent 20 years at Apple Computer as a department and project manager managing multi-million annual budgets accurately and within spending guidelines.

In 2017 the North Bay Business Journal recognized Katy as the Nonprofit Leadership Volunteer of the Year for her work at the Sonoma County YWCA Safe House. She received this award for providing her designing expertise and project management skills to renovate a 7-bedroom confidential safe house for victims of domestic abuse.

Katy also served as a Research Associate writing grants & contracts for NIH (National Institutes of Health) and NIMH (National Institutes for Mental Health) and conducting research on various behavioral science projects.

David Dearden has a professional background in construction management, grant writing, and services for homeless individuals and families.

Beginning as a laborer in the construction industry, he became a carpenter and then advanced to positions as foreman, superintendent, project manager, and owner's representative. His extensive experience includes both residential and commercial projects.

David also did grant writing for California cities, counties, and non-profit organizations, mostly focused on employment development and environmental remediation projects funded by state and federal programs.

He also managed programs that provide services for homeless individuals and families emphasizing training in employment skills development for programs funded by private foundations, and state and federal governments.

Iris F. Harrell is a retired design/build general contractor from Silicon Valley. Her remodeling company specialized in green design/build practices and ADA Aging in Place design, features coining the phrase the "Forever Home." In 2015, she sold Harrell Remodeling, a residential remodeling company to her 40 employees as a 100% employee owned ESOP.

Prior to that, Iris was a high school teacher in Richmond, Virginia and Rough Rock, Arizona on the Navajo Reservation. She also served as a regional director for Women in Community Service in Dallas, Texas.

A resident of Oakmont since January, 2016, Iris is the chair of the Firewise Committee and the chair of the Building Construction Committee, which manages improvements of the commonly-shared facilities in Oakmont. She has a BA degree from the University of Mary Washington and a Masters in Education from Virginia Commonwealth University.

Elizabeth Lefson worked for the City of South Gate, California for 20 years. Elizabeth held increasingly responsible positions ending as Senior Planner responsible for the reports to the Planning Commission and City Council. She is a graduate of the University of California, Berkeley, College of Environmental Design with a degree in Landscape Architecture. She also holds a Master in Public Administration and a graduate level Certificate in Public Sector Financial Management. She has been an Oakmont resident since 2011.

Jess Marzak was a venture capitalist for 38 years, working for Citicorp Venture Capital, Ltd., Paragon Partners I and II, and BankAmerica Ventures until 2001. He has been an angel/individual investor until 2017. Jess has participated in the creation of new businesses at the seed capital stage, as well as participating in financing of more mature, early stage companies.

He invested primarily in the telecommunications, software and software services industries and has traditionally joined the board of directors of companies he invested in.

He grew up on the east coast, received his BA in Political Science from Occidental College, and an MBA from Wharton School at University of Pennsylvania. He has lived in Oakmont for 5 years and currently serves on the Board of Directors.

Marilyn Pahr holds a MLIS degree from Northern Illinois University and spent the last twenty years of her library career as a Business Research Librarian and Manager of Faculty Services at the Goizueta Business School of Emory University in Atlanta. She served as liaison to the Executive MBA Program with a research emphasis on Competitive Intelligence.

An Oakmont resident since 2014, she serves on the boards of the Hiking Club, Oakmont Sunday Symposium and as chair of the Oakmont Library Steering Committee. Involvement in Oakmont Lifelong Learning, Genealogy Club, Futures Club and teaching classes at the OTLC are other areas of interest. Outside of Oakmont, as an avid WWII buff, she served as Deputy Commander of the Atlanta WWII Roundtable and continued her interest in California by conducting veteran interviews on behalf of the Pacific Coast Air Museum as part of the Library of Congress's Veteran's History Project. Her most fun volunteer position is as "ice cream girl" at the popular Hot Dog Thursday Open Cockpit Event at PCAM. She also enjoys being a cottage docent at Jack London State Park and a Transcendence Theater volunteer.

Attachments

Attachment A - Central Complex Map
Attachment B - What We Heard From Oakmont
Attachment C - Larger Oakmont Study Area
Attachment D - OVA Owned Property
Attachment E - 2010 Demographics Study

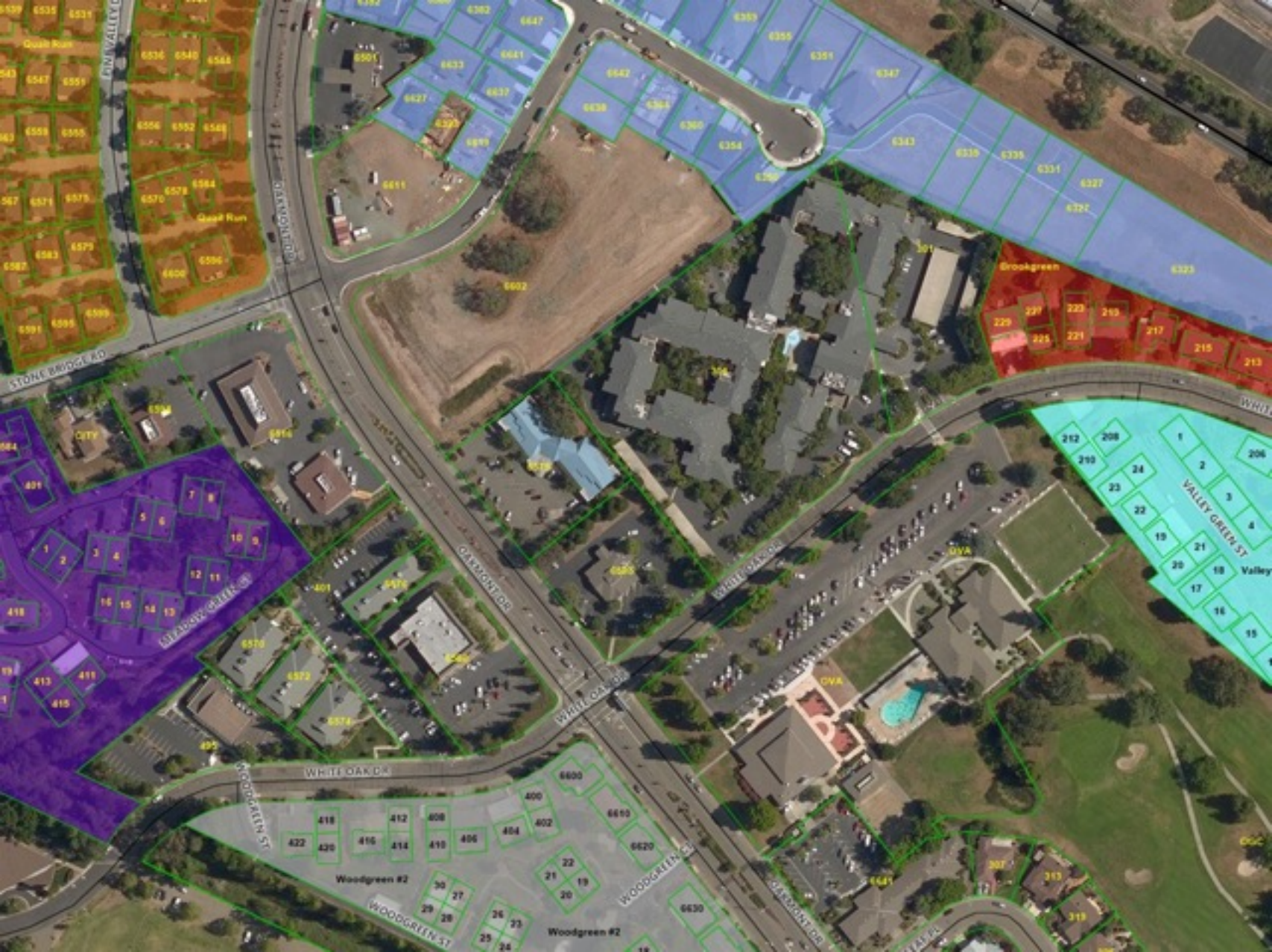
Attachment F - Berger Action Committee Report, 2/6/18

Attachment G - Dues Research

Attachment H - Oakmont Fire Maps

Attachment I - Club Survey Results

Attachment J - Elnoka Map



Green Valley Dr

Stone Bridge Ln

Greenmont Dr

White Oak Dr

Woodgreen St

Valley Green St

Greenmont Dr

White Oak Dr

Woodgreen St

Valley Green St

Greenmont Dr

White Oak Dr

6531 6533 6535

6547 6549 6551

6558 6560 6562

6571 6573 6575

6582 6584 6586

6591 6593 6595

6596 6598 6600

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6666 6668 6670

6674 6676 6678

6682 6684 6686

6690 6692 6694

6698 6700 6702

6706 6708 6710

6714 6716 6718

6722 6724 6726

6730 6732 6734

6738 6740 6742

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6686 6688 6690

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6718 6720 6722



What We Heard from Oakmont

Our Data: Where Did It Come From?

- *Voices of Oakmont Survey – 2015*
 - *Listening Sessions and Focus Groups*
 - *Resident Surveys – Both on-line and paper*
 - *1,250 online surveys and 389 paper surveys received*
 - *Used only open ended comments received using the respondent's own words*
- *The Future of Oakmont Workshop – Nov. 2018*
 - *Recorded what everyone said.*
- *Stakeholder Interviews*
 - *Conducted by the Long-Term Planning Committee over several months*
 - *Clubs, Service Organizations, Realtors, HOAs, Realtors, New Resident Surveys, Competitive Interviews, and Demographic Statistics*



Our Data: What is it?

- *Quotes from residents and stakeholders*
 - *Over 400 quotes collected and processed*
 - *Grouped into Themes where several people had a similar point*
- *A Theme Label at the Top*
 - *The theme is a summary of what several people were saying something similar*
 - *My words*
- *Quotes*
 - *The top 3-5 quotes that belong to the theme*
 - *Some themes had many more quotes*
 - *As close to being the exact words of the person interviewed as possible*
- *Arranged into a Story*



The Story

- *I will show each theme and collection of quotes*
 - *I will show and read each slide*
 - *Helps groups to both see and hear the story*
 - *Achieves a deeper understanding of the story*
- *Presenting the story will take 20-25 minutes*
 - *Please be quiet during the entire reading of the story*
 - *Please hold your questions or comments until after the story is complete*
- *Discussion period to follow*
 - *The main purpose of this workshop is to discuss these findings with each other*
 - *Co-facilitators will help record what you say and pass microphones around so each person who wants to speak can be heard.*
 - *The Board and the Long-Range Planning Committee are present.*



Ready to Begin?



Why do people choose to buy homes in Oakmont?

From Realtors

- *“They want to give up the ‘trophy house’ and downsize.”*
- *“They want to move out of neighborhoods that are primarily families (especially with teenagers!).”*
- *“The beauty of the surrounding area.”*
- *“They love the Valley of the Moon, the weather, and the many activities available in Oakmont.”*
- *“Desire to be in a retirement community with lots of amenities (a variety of clubs, social activities, and fitness opportunities).”*
- *“The golf course is very important to new buyers. It provides open space and beautiful views.”*



Who Lives in Oakmont?

Demographic Data from 2010 Census

- *The average age for Oakmonters is probably still close to 76.*
- *Most of us are women, 61% overall and 35% of new purchases are by single women.*
- *Oakmont is solidly middle class and married couples are more secure financially.*
- *Most Oakmont households receive both Social Security and a pension or retirement savings.*
- *88% of new Oakmont residents come from California, 66% come from Northern California.*



Keep Oakmont a Small Town

Residents

- *“Oakmont has a small town feel to it that we like very much.”*
- *“Keep it quaint and like a small town.”*
- *“The “quaintness” should be maintained. I do not want Oakmont to become like all the other cookie cutter retirement communities.”*
- *“I am concerned we will lose our small-town feel. We need to keep our plans in scale.”*



I Want to Keep Oakmont the Way it Currently Is

Residents

- *“I hope that the current Board can keep things mostly as they are.”*
- *“Focus resources on maintaining the EXISTING facilities at a high level of quality.”*
- *“Oakmont is a pretty nice place as it is. We are not a Del Webb community, thank God.”*
- *“It is an excellent senior community. Keep it attractive but don't worry about keeping up with the high-end Jones’.”*



However, Our Facilities Are Outdated

Residents

- *“Nothing turns away prospective Oakmont residents faster than tired facilities, outdated decorating, and “business as usual” attitudes.”*
- *“The Berger Center looks very tired on the exterior and needs a facelift.”*
- *“I feel since so many clubs use the Berger Center for Socials it needs a total remodel. Everything in there is so outdated.”*
- *“Our AV systems are outdated and are too complicated.”*
- *“The lighting, sound system, air conditioning, flooring, and kitchen need to be redone.”*



We Don't Have Enough Space

Residents

- *"We don't have enough storage space."*
- *"We don't have enough auditorium space."*
- *"I am concerned that we will lose the space that we have."*
- *"Expand the space so more people and events can be accommodated."*
- *"The Berger Center really needs to be expanded so the special events aren't so terribly crowded."*



Our Clubs Don't Have Enough Space

From Our Clubs

- *"We need more meeting spaces for all clubs."*
- *"Our space is really too small to accommodate everyone."*
- *"We would be able to offer more classes and performances if we had more space."*
- *"We're fighting other clubs and activities to keep our current space."*
- *"The fitness center is a joke, needs a serious upgrade, it is the worst fitness center in any senior community."*



And Participation in Clubs is Growing

From Our Clubs

- *“Our membership has quadrupled over the last few years.”*
- *“Our membership tripled in last three years, from 25 to 75 people.”*
- *“The facility problem gets worse every year because we keep adding new clubs.”*
- *“I’m not sure how many more activities I can add because of competition for space.”*
- *“The Fitness Club needs to double in size to support the community correctly.”*



We Need to Upgrade the Berger Center

Residents

- *“The Berger Center needs to be enlarged and upgraded.”*
- *“Improve the Berger Center; take into consideration future growth and needs.”*
- *“Modernize the Berger Center's interior and expand its capacity for events.”*
- *“An enlarged and integrated central facility that encompasses the present CAC and Berger into a comprehensive center worthy of Oakmont.”*
- *“Berger Center renovations and expansions should be more Del Webb like to address the future and loss to other 55 + communities.”*
- *“Berger center complete redo!!”*



Replace the Berger with Something Bigger and Better

Residents

- *“Connect the Berger Center to the CAC and expand the fitness center and library.”*
- *“Tear down the Berger Center and build a new facility with a theater, more meeting rooms, a ballroom, a great kitchen so we can have better caterers.”*
- *“Berger torn down and rebuilt to 21st century standards.”*



We Want Additional Facilities

Residents

- *“We need a comprehensive plan for the whole Berger, CAC complex and make it a gathering place for our residents.”*
- *“We need a performance venue. This could act as an additional source of revenue.”*
- *“We need a true theater with comfortable seats that were staggered and ramped so sight lines could be used.”*
- *“The idea of building a performing arts center as a separate building was very popular with many of the clubs we interviewed.”*



We Need to Support Informal Community Gatherings

Residents

- *“Enhanced community spaces where residents could congregate.”*
- *“A total remodel of Berger that includes having connection between CAC.”*
- *“Incorporate a coffee bar/cyber cafe/wine bar into the Berger Center with room for people to socialize.”*
- *“Shade area for outdoor sitting in the Berger center area.”*



I am Concerned I Won't Be Able to Afford to Live Here

Residents

- *"I am concerned I won't be able to afford to live here."*
- *"The cost of living in Sonoma County is increasing rapidly."*
- *"There are many people here that live on a single income and are stretching their budgets to be able to be in this wonderful place."*
- *"There are many who cannot afford a raise in our HOA dues."*
- *"It would be sad to see older residents have to leave Oakmont because they can no longer afford to live here."*



I am Concerned We are Spending Money We Don't Have

Residents

- *"I am concerned that we are spending money we don't have."*
- *"Don't spend money that we don't already have or will be recaptured through current dues."*
- *"I would hope the Board would be less "free-wheeling" with our money."*
- *"Let's not take on too much debt."*



I am Concerned We Are Creating Grandiose Plans We Can't Afford

Residents

- *"The cost of many of the projects seems excessive to me."*
- *"I believe Oakmont has to renovate buildings to attract new people. But, please be conservative and find ways to do the job without overspending."*
- *"We hope that our Board is fiscally responsible and does not spend our money on embellishments over critical infrastructure."*
- *"We have a wealth of amenities right now. I am concerned about raising dues or adding assessments to build new amenities that we don't really need."*



So, Please Plan Carefully

Residents

- *“The Berger center likely should have something done following careful study to determine the most reasonable course for budget and future viability of the project.”*
- *“I would like to see improvements, but I want them to be well thought out.”*
- *“Prioritize expenditures, create a long-range plan, and research needs.”*
- *“Are ‘needs’ being addressed before ‘wants’?”*
- *“I'd like the Board to lead the community to develop a vision for Oakmont in 2025 or 2035 and then the steps to realize the vision.”*



Keep the Dues

Increases to a Minimum

Residents

- *“We are blessed to be living in this beautiful valley. Try to keep the monthly dues increase to a minimum.”*
- *“Work on ways to keep HOA fees as low as possible without having the property appearance decline over time.”*
- *“Keep us fiscally solvent. We should appear as contemporary as other similar retirement facilities, but, offer better value.”*
- *“DO NOT overspend on costly new facilities that result in increases in fees/assessments.”*



However, Oakmont Needs to Be More Competitive

Residents

- *“Get more competitive.”*
- *“We need improvements that will keep Oakmont competitive with the top retirement communities so that property values are maintained.”*
- *“The community needs some upgrades to stay competitive with other senior housing developments.”*
- *“Keep up with trends in other retirement communities to assure home values.”*



We Need to Invest in Facilities Improvements

Residents

- *“I think it is important to be willing to invest in facilities improvements, both for the benefit of residents and enhancement of property values.”*
- *“Invest now to keep the facilities in top-notch shape.”*
- *“Raise the dues, initiate special assessments and find other ways to raise money for the needed and desired changes to Oakmont.”*



Most New Residents are Younger and More Affluent

From Realtors

- *“New residents are younger ... in mid-to-late 60s and 70s, from Sonoma County, Marin County, or the Bay Area, because they’re downsizing.”*
- *“We are seeing younger buyers the last few years, and they are interested in safe communities with good amenities.”*
- *“Buyers are younger now, more affluent, and mostly come from the Bay area; cost is not as much of an issue.”*
- *“Most new buyers can afford to pay for their home in cash, but some choose a small mortgage due to low interest rates now.”*
- *“Very few have big mortgages. Most purchases are in cash.”*



New Buyers See OVA Dues as Low

From Realtors

- *“Dues (currently at \$75/person/month) are not a deterrent to new purchasers.”*
- *“OVA dues and club membership fees are dirt cheap and not a concern for new buyers. Even those with fixed incomes are not concerned about this.”*
- *“95-99% of new buyers think our dues are ridiculously low.”*
- *“Buyers say that OVA dues are a bargain.”*



Recreational Facilities are Important to New Buyers

From Realtors

- *“Be sure to keep the recreational facilities updated so we can compete with other retirement communities.”*
- *“Home buyers love our gym and say that the more facilities we have the better.”*
- *“The biggest fear of buyers is the future of the OGC.”*
- *“Potential buyers need to be assured that the golf courses will stay, and their property values won’t decline.”*
- *“The majority of possible purchasers don’t play golf but like the open spaces.”*



Our Leaders Need to Think Beyond Their Personal Interests

Residents

- *“Drop your personal agendas and listen to the residents.”*
- *“We don’t want decisions being made based on personal biases and values.”*
- *“Recognize that Board members have a fiduciary responsibility whose basic job is to represent their constituents and not simply to propose and advocate those projects and policies which they personally consider important.”*
- *“Use our dues for real needs rather than the personal interests of members of the Board.”*



Listen to the Whole Community, Not Just the Louder Voices

Residents

- *“I am tired of the few angry complainers getting their way.”*
- *“Listen to ALL the residents, not just the noisy few.”*
- *“Pay attention to the results of this survey, instead of approving personal agendas by a small vocal group of residents.”*
- *“The Board should represent all of the residents, not only those with the loudest voice.”*
- *“Stop fighting among yourselves and truly listen to all of the residents.”*



What Our Competitors Have

From our Survey of Competitors

- *“All of the communities we interviewed had an activities director to coordinate all community activities.”*
- *“Three of four communities had a new large fitness center which was a central activity for the residents of the community.”*
- *“Every community had a central “social” area centered around a small coffee and snack bar, or restaurant, that people regularly used for informal social interaction.”*
- *“Fees were charged in three of the four communities for room rentals and other activities that are free at Oakmont.”*



What Our Competitors are Doing Financially

From a Survey of Competitors

- *“Dues are \$147/month/home for enforcement of CCR, front landscaping and major buildings.” (Springfield)*
- *“Additional fees of \$56/month/home for gates, streets and street lights (infrastructure).” (Springfield)*
- *“HOA dues are \$127/month/home, going up to \$133 next year.” (Sun City)*
- *“Currently fee of \$1,500 (going up to \$2,500) for each home sold which raised \$538,000 last year for a Community Enhancement Fund, which pays for new construction and remodels (keeps dues low)” (Sun City)*
- *“Music venues include an outdoor 2,500 seat amphitheater and the public is invited to all performances. This is a revenue generator for Sun City.”*

End



LRPC Conclusions

Through interviews, the LRPC identified the following needs:

- There is a critical need for more space to properly support our activities, clubs, and fitness center.
- We need to keep Oakmont competitive and attractive so we can continue to attract new home buyers.
- A performance venue would be very useful to our residents and clubs and could be a source of revenue.
- A community gathering center would enhance our sense of community and improve social interactions essential for this time of life.

Conclusion:

Meeting these needs is essential to keep Oakmont competitive over the next 20 years and would be seen as affordable to new buyers and most existing residents.



Recommended Next Step

- Hire a community architect to create a vision of our future community we can all see.
 - A baseline vision to meet our essential needs. MINIMUM NEEDS
 - An enhanced vision of what might be reasonably possible. ENHANCED



What is Our Vision?

- What can you tell us about the vision you would like to see for Oakmont?
 - How should we go about meeting these needs?
 - What does it look like?

End





Site 1
Site 8
Site 2
Site 3

Site 7

Site 6

Site 4

Site 5

TRIONE-ANNADEL STATE PARK

Oakmont Opportunity Sites

Site #1 6310 – 6318 Stonebridge Road



12/30/2024 4:15:21 PM

County Assessor Information

Address: 0 STONE BRIDGE RD
SANTA ROSA, CA 95409

Land Use: COMMON AREA WITHOUT STRUCTL

Tax Area: 004009

Jurisdiction: SANTA ROSA

Recording#: 1988R092512

Rec Date: 10/28/1988

Lot Acres: 6.10

Land Value: \$0

Bldg Value: \$0

Bldg Sqft: 0

Built:

Res Units:

Bedrooms: 0

Bathrooms: 0

Com Units:



Santa Rosa Only Information

General Plan: Low Residential

Area Plan:

Zoning Code: PD 63-001-RC

Identifier:

Planned Dev: PD 63-001-RC

Historic Dist:

Fault km: 10

Wind Zone: Exposure B

Fire Zone: Yes

Park Fee: Service Area No. 5 - Oakmont

Fire District: 7

GIS Calculated Information

Lot Acres: 6.09

Latitude: 38.449299

Longitude: -122.624044

Census Tract: 151602

Census Block: 3002

Street Sweep: 4th Friday

Elem School: AUSTIN CREEK

This report is a user-generated static output from an internet mapping site and is for reference only. Data that appears on this report may or may not be accurate, current, or otherwise reliable. GIS Calculated Lot Acres is NOT official. Assessor's Data is maintained by Sonoma County.

Site #2 6311 – 6319 Stone Bridge Road



12/5/2023 4:12:16 PM

County Assessor Information

Address: 0 STONE BRIDGE RD
SANTA ROSA, CA 95409

Land Use: COMMON AREA WITHOUT STRUCTL

Tax Area: 004009

Jurisdiction: SANTA ROSA

Recording#: 1988R092512

Rec Date: 10/28/1988

Lot Acres: 1.79

Land Value: \$0

Bldg Value: \$0

Bldg Sqft: 0

Built:

Res Units:

Bedrooms: 0

Bathrooms: 0

Com Units:



Santa Rosa Only Information

General Plan: Low Residential

Area Plan:

Zoning Code: PD 63-001-RC

Identifier:

Planned Dev: PD 63-001-RC

Historic Dist:

Fault km: 10

Wind Zone: Exposure B

Fire Zone: Yes

Park Fee: Service Area No. 5 - Oakmont

Fire District: 7

GIS Calculated Information

Lot Acres: 1.78

Latitude: 38.449511

Longitude: -122.621978

Census Tract: 151601

Census Block: 1005

Street Sweep: 4th Friday

Elem School: AUSTIN CREEK

Site #3 6311-6319 Stonebridge Road



OVA - PARCEL 016-690-012



Total: 3,272.78 ft

ton6311-6319 Se Bridge Rd Par Course Area



12/3/2020

Scale 1: 2,400

0 Miles 0.04

City of Santa Rosa Parcel Report

016-690-012

12/3/2020 4:26:49 PM

County Assessor Information

Address: 0 STONE BRIDGE RD
SANTA ROSA, CA 95409

Land Use: COMMON AREA WITHOUT STRUCTURES

Tax Area: 004009

Jurisdiction: SANTA ROSA

Recording#: 2002R187299

Rec Date: 11/27/2002

Lot Acres: 10.05

Land Value: \$0

Bldg Value: \$0

Bldg Sqft: 0

Built:

Res Units:

Bedrooms: 0

Bathrooms: 0

Com Units:



Santa Rosa Only Information

General Plan: Low Residential

Area Plan:

Zoning Code: PD 63-001-RC

Identifier:

Planned Dev: PD 63-001-RC

Historic Dist:

Fault km: 10

Wind Zone: Exposure B

Fire Zone: Yes

Park Fee: Service Area No. 5 - Oakmont

Fire District: 7

GIS Calculated Information

Lot Acres: 10.84

Latitude: 38.448538

Longitude: -122.621336

Census Tract: 151601

Census Block: 1005

Street Sweep: 4th Friday

Elem School: AUSTIN CREEK

Site # 4 7025 Oakmont Drive





**7025 Oakmont Dr - West Course Club House
Building and Parking lot area only**



12/6/2020

Scale 1: 1,000

0 Miles 0.02

12/3/2020 4:41:47 PM

County Assessor Information

Address: 7025 OAKMONT DR
SANTA ROSA, CA 95409

Land Use: COUNTRY CLUB

Tax Area: 004009

Jurisdiction: SANTA ROSA

Recording#: 2020R009304

Rec Date: 02/06/2020

Lot Acres: 27.05

Land Value: \$330,000

Bldg Value: \$440,000

Bldg Sqft: 18,452

Built: 1968

Res Units:

Bedrooms:

Bathrooms:

Com Units:



Santa Rosa Only Information

General Plan: Parks/Recreation

Area Plan:

Zoning Code: PD 63-001-RC

Identifier:

Planned Dev: PD 63-001-RC

Historic Dist:

Fault km: 10

Wind Zone: Exposure B

Fire Zone:

Park Fee: Service Area No. 5 - Oakmont

Fire District: 7

GIS Calculated Information

Lot Acres: 19.72

Latitude: 38.434049

Longitude: -122.591425

Census Tract: 151601

Census Block: 3006

Street Sweep: 4th Friday

Elem School: AUSTIN CREEK

Site #5 – Oak Vista Drive, East Clubhouse



OVA - PARCEL 016-180-078



OAK VIST ACT. EAST COURSE CLUBHOUSE



12/3/2020

Scale: 1" = 4.80'

0 Miles 0.06



12/30/2020 4:15:15 PM

County Assessor Information

Address: 559 OAK VISTA CT
SANTA ROSA, CA 95409

Land Use: 18 HOLE PUBLIC GOLF COURSE

Tax Area: 004042

Jurisdiction: SANTA ROSA

Recording#: 2020R009304

Rec Date: 02/06/2020

Lot Acres: 6.30

Land Value: \$60,000

Bldg Value: \$80,000

Bldg Sqft: 3,963

Built:

Res Units:

Bedrooms:

Bathrooms:

Com Units:



Santa Rosa Only Information

General Plan: Parks/Recreation

Area Plan:

Zoning Code: PD 63-001-RC

Identifier:

Planned Dev: PD 63-001-RC

Historic Dist:

Fault km: 10

Wind Zone: Exposure B

Fire Zone:

Park Fee: Service Area No. 5 - Oakmont

Fire District: 7

GIS Calculated Information

Lot Acres: 8.79

Latitude: 38.425291

Longitude: -122.580079

Census Tract: 151602

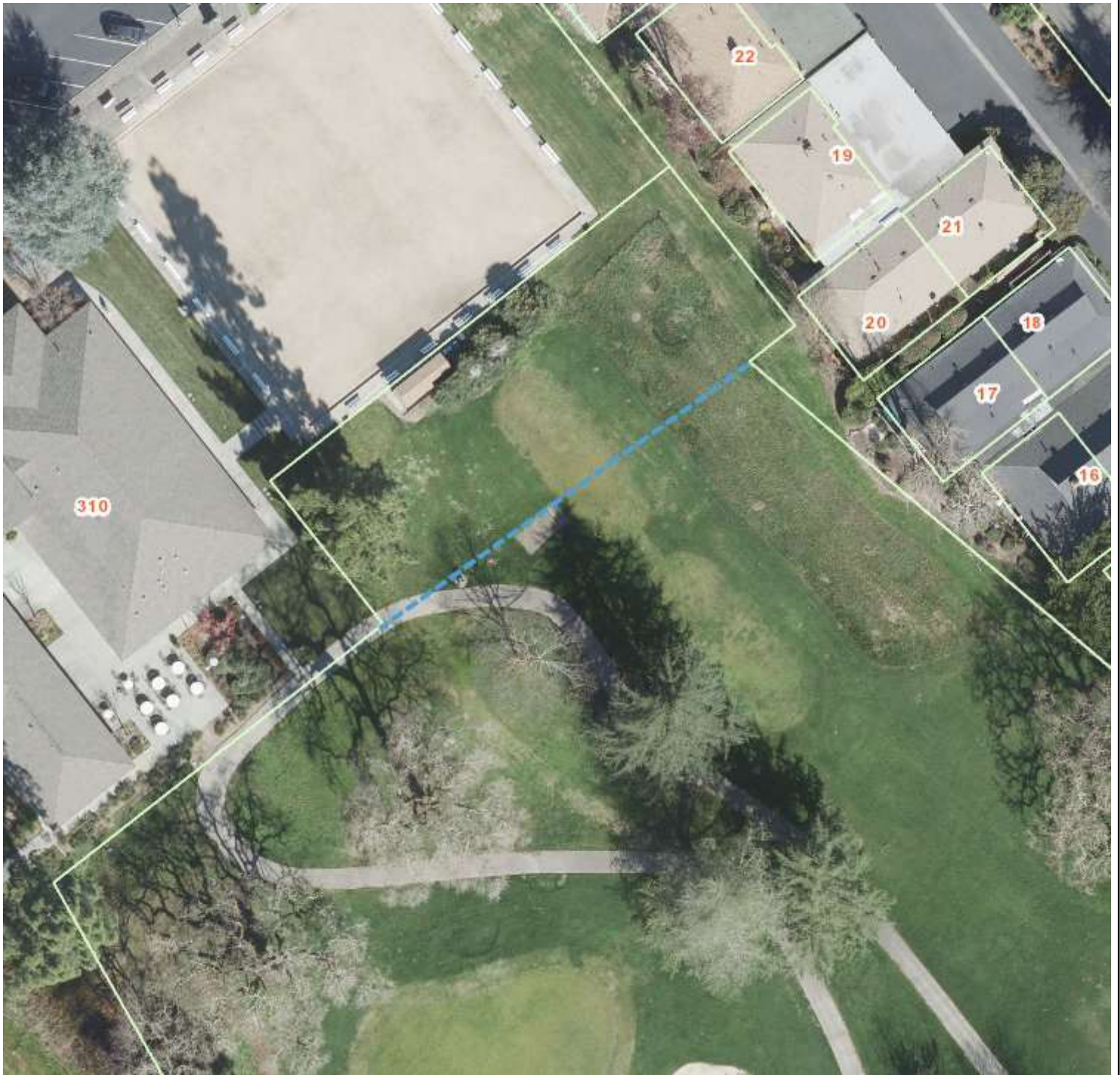
Census Block: 2003

Street Sweep: 4th Friday

Elem School: KENWOOD

Site #6 – 6637 Oakmont Dr., Central Area Complex





Golf Course - Behind CAC

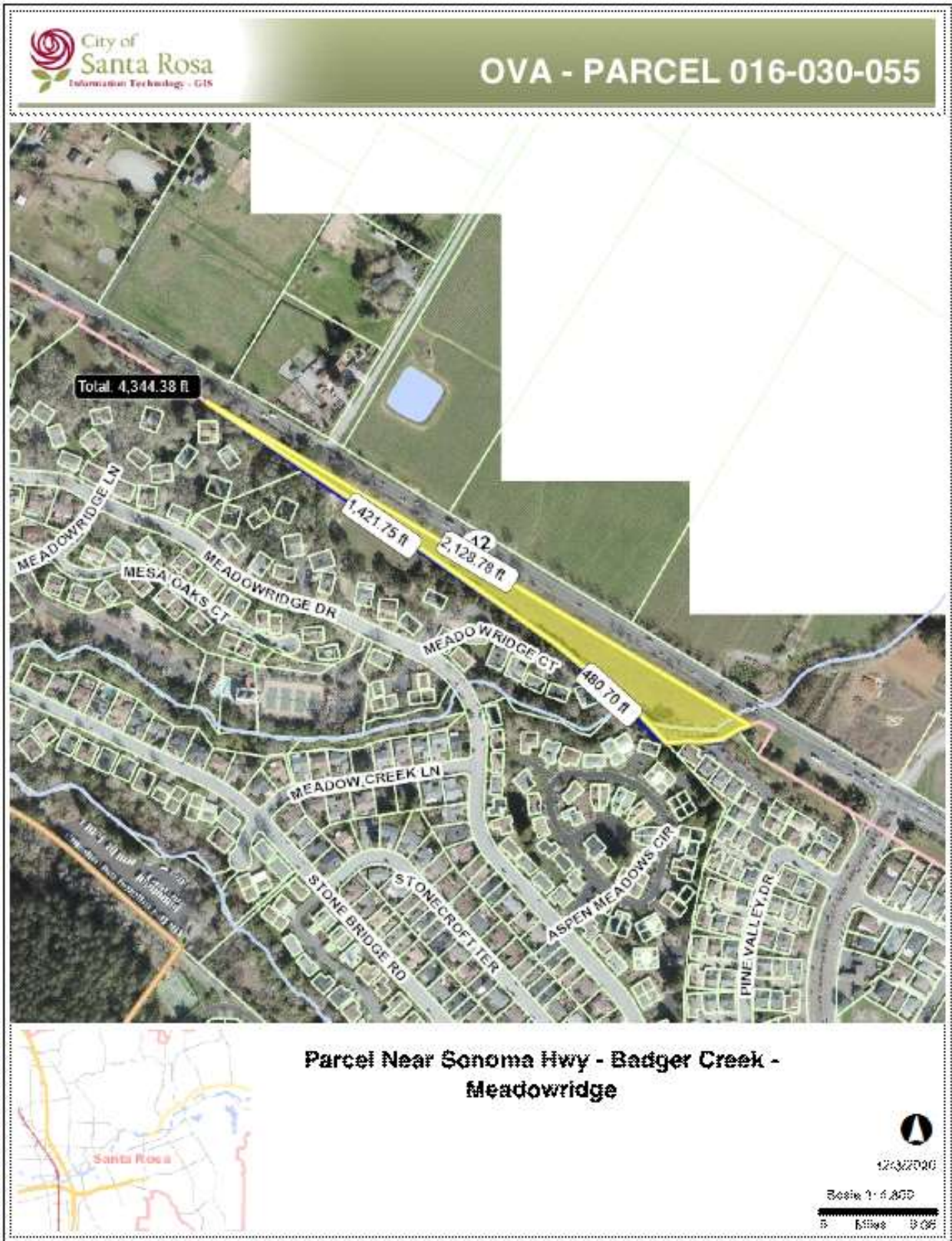


1/26/2021

Scale 1: 600

0 Miles 0.01

Site #7 – Hwy 12 near Badger Creek



City of Santa Rosa Parcel Report

016-030-055

12/5/2023 4:19:18 PM

County Assessor Information

Address: 0 PINE VALLEY DR
SANTA ROSA, CA 95409

Land Use: COMMON AREA WITHOUT STRUCTL

Tax Area: 004009

Jurisdiction: SANTA ROSA

Recording#: 1997R035053

Rec Date: 04/29/1997

Lot Acres: 5.46

Land Value: \$0

Bldg Value: \$0

Bldg Sqft: 0

Built:

Res Units:

Bedrooms: 0

Bathrooms: 0

Com Units:



Santa Rosa Only Information

General Plan: Low Residential

Area Plan:

Zoning Code: PD 63-001-RC

Identifier:

Planned Dev: PD 63-001-RC

Historic Dist:

Fault km: 10

Wind Zone: Exposure B

Fire Zone: Yes

Park Fee: Service Area No. 5 - Oakmont

Fire District: 7

GIS Calculated Information

Lot Acres: 3.54

Latitude: 38.446422

Longitude: -122.608367

Census Tract: 151601

Census Block: 1000

Street Sweep: 4th Friday

Elem School: AUSTIN CREEK

Site #8 – Water Treatment Plant



Municipal Utility Property - Water
6308 Stone Bridge Rd
016-030-005
Not OVA Owned Property



1/26/2021

Scale 1: 2,400

0 Miles 0.04

City of Santa Rosa Parcel Report

016-030-005

12/15/2023 9:15:46 PM

County Assessor Information

Address: 6308 STONE BRIDGE RD
SANTA ROSA, CA 95409

Land Use: MUNICIPAL UTILITY PROPERTY

Tax Area: 004009

Jurisdiction: SANTA ROSA

Recording#: 1975R2260108

Rec Date: 01/01/1975

Lot Acres: 6.35

Land Value: \$0

Bldg Value: \$0

Bldg Sqft: 0

Built:

Res Units:

Bedrooms: 0

Bathrooms: 0

Com Units:



Santa Rosa Only Information

General Plan: Public/Institutional

Area Plan:

Zoning Code: PD 63-001-RC

Identifier:

Planned Dev: PD 63-001-RC

Historic Dist:

Fault km: 10

Wind Zone: Exposure B

Fire Zone: Yes

Park Fee: Service Area No. 5 - Oakmont

Fire District: 7

GIS Calculated Information

Lot Acres: 6.32

Latitude: 38.448706

Longitude: -122.625093

Census Tract: 151602

Census Block: 3002

Street Sweep:

Elem School: AUSTIN CREEK

This report is a user generated static export from an internet mapping site and is for reference only. Data that appears on this report may or may not be accurate, current, or otherwise reliable. GIS Calculated Lot Acres is NOT official. Assessor's Data is maintained by Sonoma County.

Oakmont: Who are we?

A Snapshot of our community from the April 2010 US Census

Contents

Age and Gender 1

Marital Status..... 2

Home Ownership and Tenure..... 3

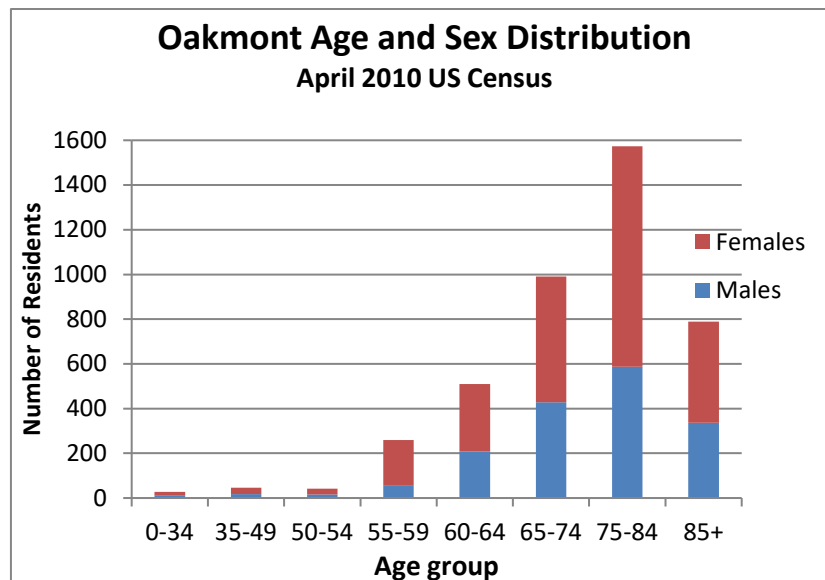
Past Demographic Characteristics 5

Income and Employment..... 5

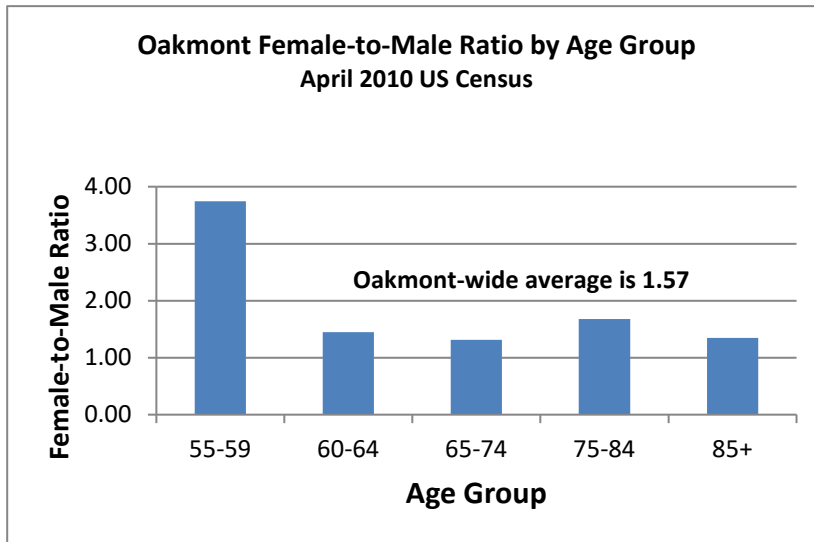
Where do Oakmont’s Residents Come From?..... 8

Age and Gender

- We are a 55+ community of 4465 residents, with a median age of 76.** 1758 of us are male and 2707 are female. About 20% of us are “Baby Boomers”, while less than 2% of our residents are under 50. Only 2.1% of the residents were Hispanic, and 2.7% of the residents were non-white.

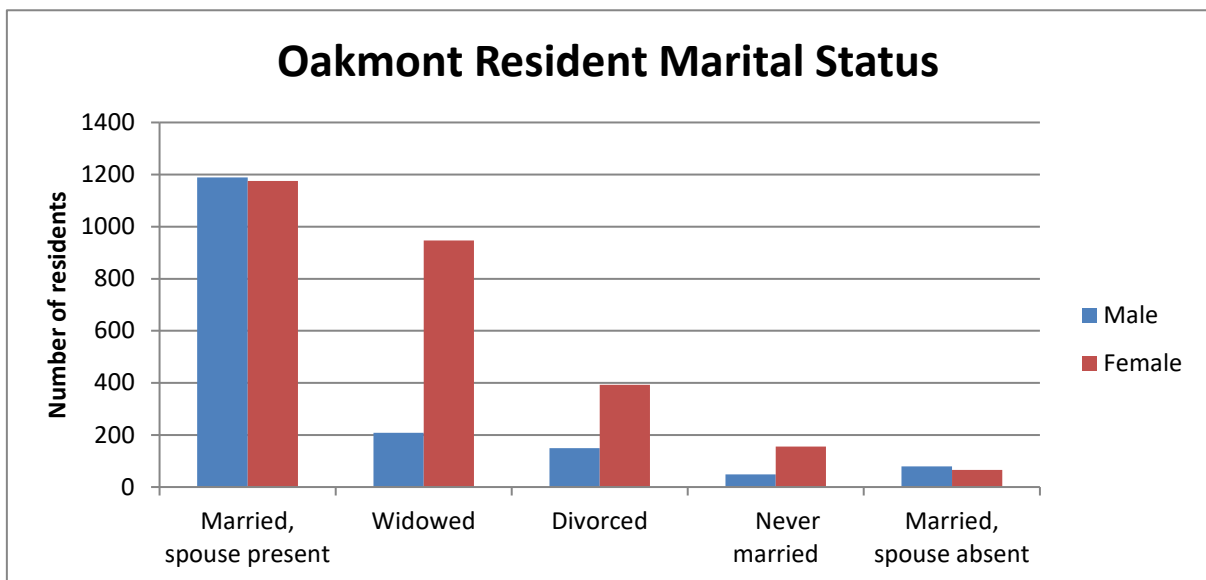


- Most of us are women, particularly the newcomers.** Overall, women make up 61% of Oakmont’s population, giving an average female-to-male ratio of 1.57. Women make up almost 80% of the 55-59 age group. Approximately half of these women are married, many to older Oakmont men. Somewhat surprisingly, although women outnumber men in the 85+ age group, their ratio is actually a bit lower than the Oakmont average.

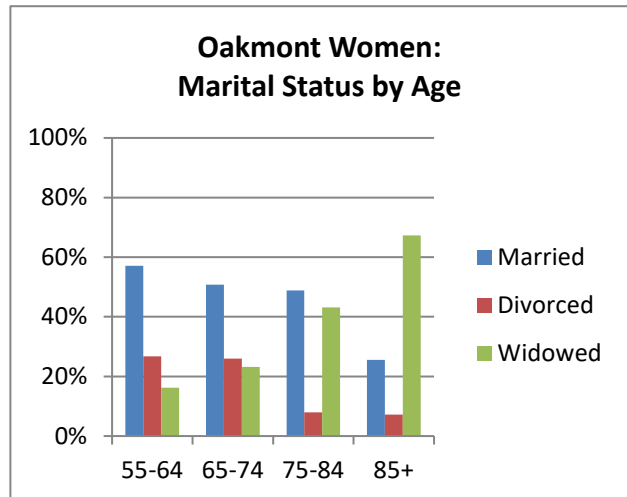
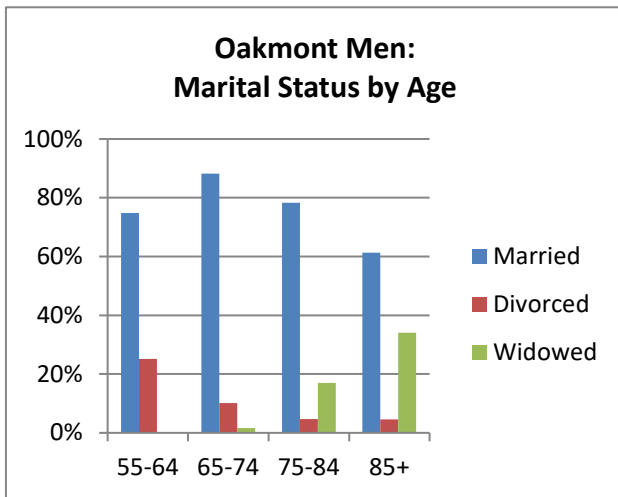


Marital Status

- Most men are married, and most women are not.** About 67% of the men are married, but only 43% of the women are married. Most of our women are widowed or divorced.

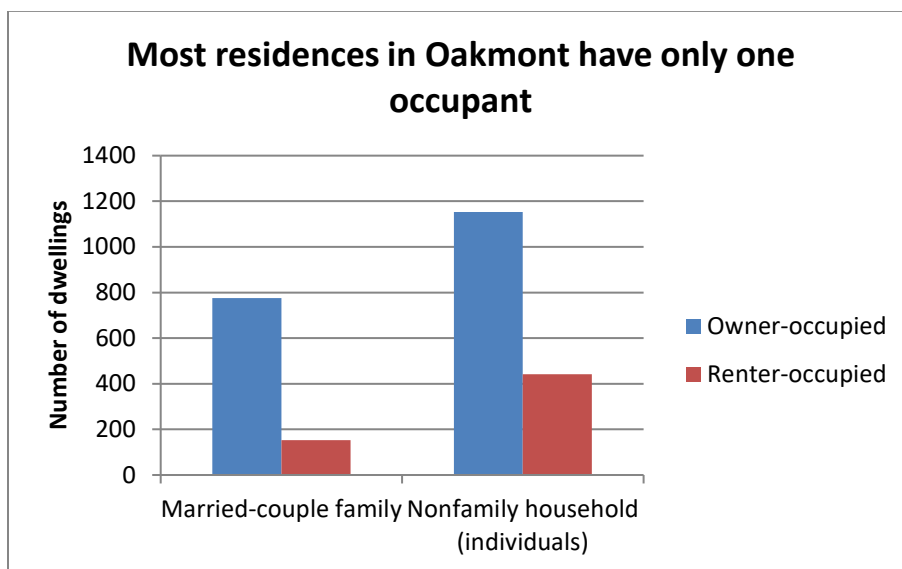


4. As Oakmont residents age, a significant difference develops between the men and the women. This is seen in the two graphs below. In the Oakmont Baby Boomer age group of 55-64 there are only slight differences in marriage status between men and women, with most of each sex being married, and about 25% divorced. But it changes substantially for the 65-74 group. The divorced men tend to remarry more, boosting their marriage rate to 88%. A large majority of men in every age group are married. This is not the case for the women. The 75-84 age group has almost as many widows as married. Two-thirds of women in Oakmont over 85 years old are widows.



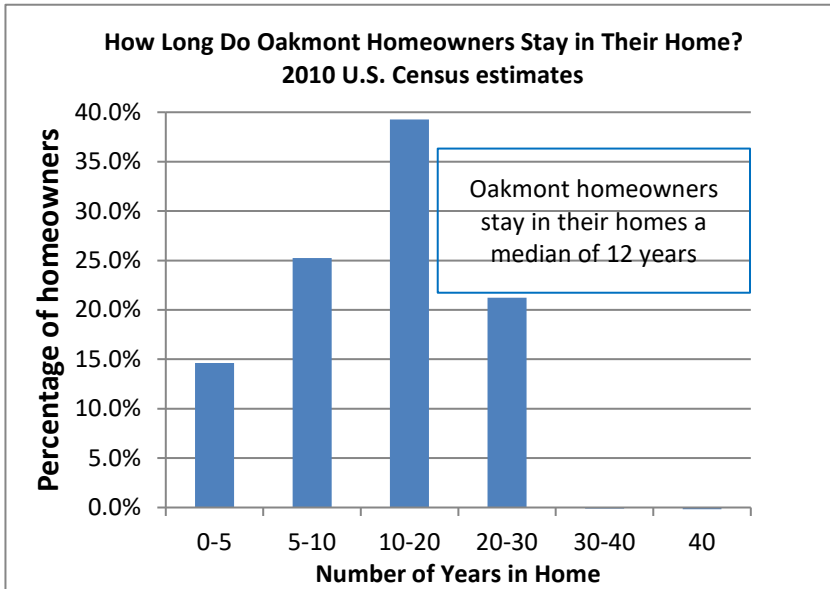
Home Ownership and Tenure

5. About 77% of the homes in Oakmont are owner-occupied. Most of these have only one occupant. Similarly, most of the renter-occupied homes also have only one occupant.

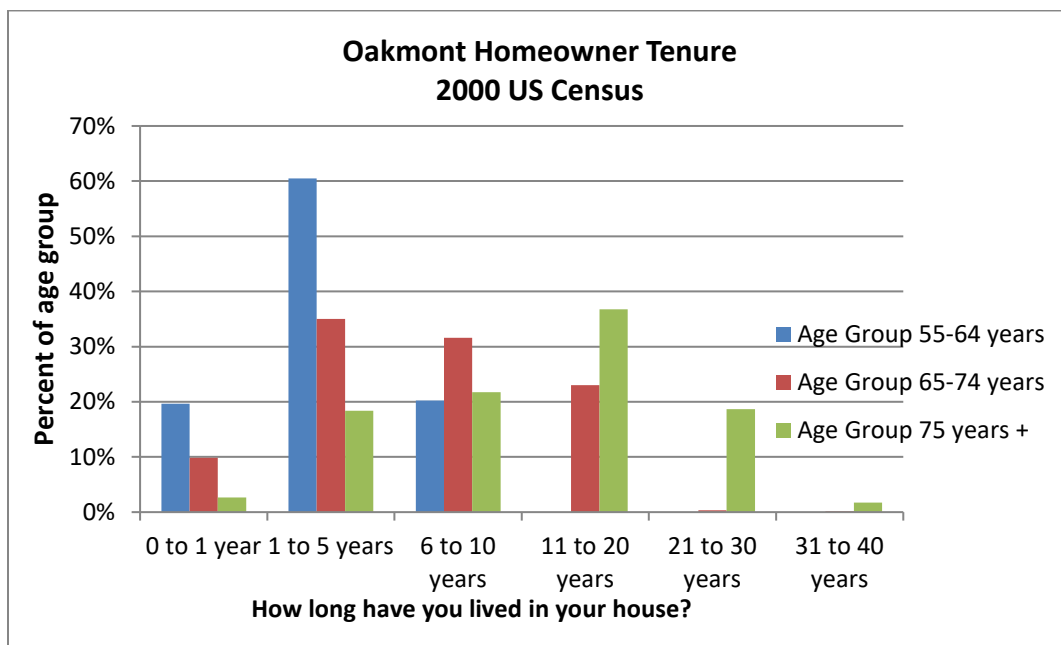


About half of us live alone. Oakmont averages 1.53 residents per occupied dwelling. The owner-occupied homes average only 1.56 residents, while the renter-occupied dwellings average 1.45 residents. By way of comparison, Santa Rosa averages 2.53 residents per owner-occupied dwelling.

- Future changes in the Oakmont median age of 76 would take place slowly, if at all.** If you own your home in Oakmont your median tenure in that home is 12 years. If you rent, your tenure in that residence is 8 years, which is twice as high as the median outside of Oakmont.

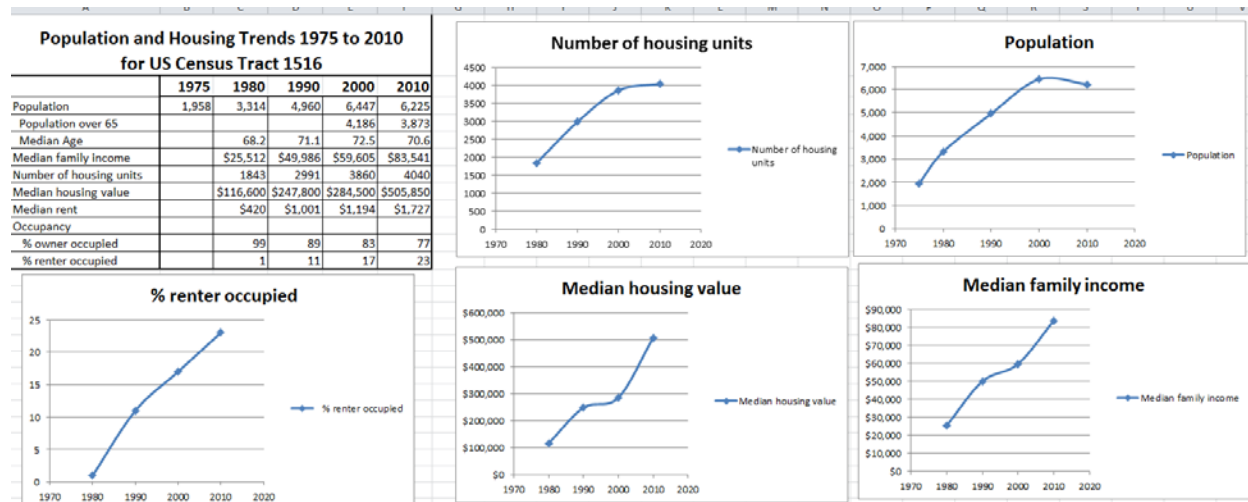


If the median homeowner tenure is 12 years, then the turnover rate should be around $1/12 = 8\%$ /year. If we have an inventory of about 2000 owner occupied homes, then there should be on the average about 160 homes for sale each year in Oakmont. This provides a check with our realtors.



Past Demographic Characteristics

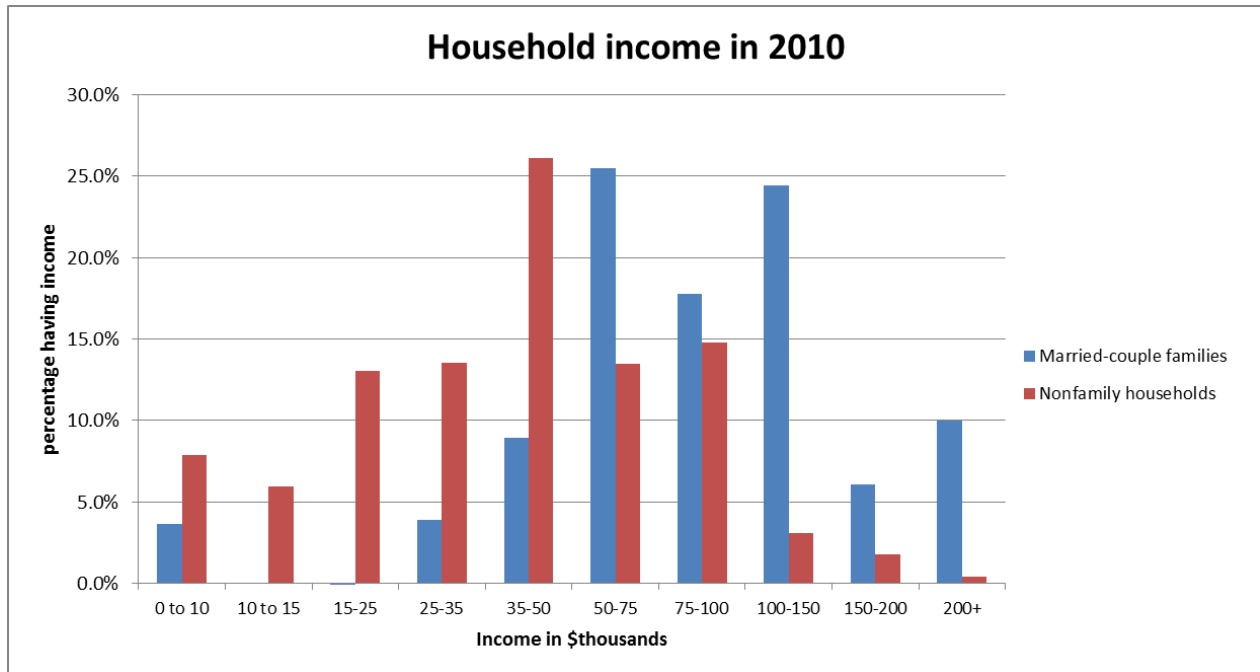
7. After decades of growth, **our population stabilized about 15 years ago**. The figures below are for U.S. Census Tract 1516, which includes Oakmont and an additional 1760 younger non-Oakmont residents. Since Oakmont makes up 72% of CT 1516’s population, the general trend of the figures below would also apply to Oakmont. Notice that the percentage of renter-occupied dwellings has climbed steadily from almost zero to about 23% today. This 23% figure includes Oakmont Gardens.



Income and Employment

8. **Oakmont is solidly middle class, and married couples do very well.** The estimated 2010 Oakmont median household income was \$56,000 and the average was \$75,000. Married couple households average over twice the income as persons living alone -- \$87,154 vs \$39,441. Notice in the graph below the differences in the \$100,000+ income, depending upon whether you are a family or "nonfamily household". A "nonfamily household" is either a single person living alone or two or more unrelated people living together.

About 40% of the married couple families had a 2010 income over \$100,000, and 10% of them had incomes over \$200,000. On the other hand, it appears that approximately one quarter of our single residents are living on less than \$25,000 per year. Thus, while the average Oakmont household income is \$75,000, we have many who are doing very well financially and many who are not.



9. **Most Oakmont households receive both Social Security and a pension.** Most retired Americans do not have both, Boomers in particular. In addition, many of us in Oakmont work full-time or part-time and earn on the average over \$70,000 per year from doing it. Less than 2% of us receive public assistance or food stamps.

Only about 14% of the Oakmont residents are in the labor force. However, many of us who work part time in retirement are not counted as “in the labor force”. Of the people in the labor force, roughly 11% of them, about 70, are unemployed. This number is small enough to have a lot of statistical uncertainty; that is, it could just as easily be 5% or 15%.

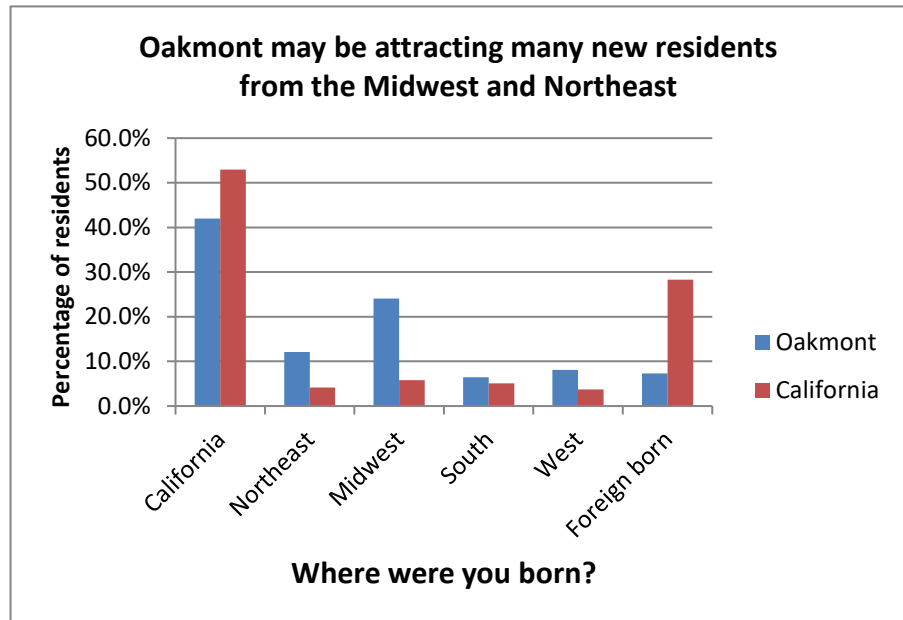
SOURCES OF INCOME FOR OAKMONT RESIDENTS

In 2012 inflation-adjusted dollars

Income Source	Amount	Comments
Per capita income	\$48,295	higher than nationwide average of \$39,791
% of total households with earnings	16%	"Earnings" include wages from full-time or part-time work, investment and rental income, and exercised employer stock options.
% of total households with earnings from self-employment	9%	Many of us continue to do consulting and run a small business in retirement
Mean earnings	\$70,207	
% of total households with Social Security	95%	This estimate suggests that almost every household has at least one person receiving Social Security.
Mean Social Security income	\$19,781	
% of total households with retirement income	61%	Includes defined benefit pension plans such as govt and school pensions. Includes IRAs and defined contribution pension plans such as 401k and 403b.
Mean retirement income	\$30,767	
% of total households with Supplemental Security Income	5%	Aged, disabled, or blind.
Mean Supplemental Security Income	\$18,814	
% of total households with cash public assistance income	1%	
Mean cash public assistance income	\$13,553	
With Food Stamp/SNAP benefits in the past 12 months	1%	
Population 16 years and over		
Not in labor force	86%	
In labor force	14%	
Employed	13%	
Unemployed	11%	Only about 14% of the Oakmont residents are in the labor force. Of these people, roughly 11% of them are unemployed.

Where do Oakmont’s Residents Come From?

10. **Oakmont appears to draw most new residents from California, with significant numbers from the Midwest and Northeast.** The Census Bureau does not collect data on, “Where did you move to Oakmont from?”, so the chart to the right serves as an imperfect surrogate for that question. It provides the place of birth for



the Oakmont residents and compares it to the rest of California. Over 36% of Oakmont’s residents were born in the Midwest and Northeast, compared to less than 10% of California’s residents. Compared to California, Oakmont has fewer foreign born residents.

Berger Action Committee (BAC)

Progress Report #2, January 30, 2018 Summary of Options Analysis, 2/6/2018

OPTIONS FOR THE BERGER PROJECT (HAZ-MAT REMOVAL INCLUDED)	COST	With full upgrade allowances*
1) Remodel existing building with modest upgrades and no increase in size	\$2,961,302	\$3,661,302
2) Remodel existing building with modest upgrades and add new addition	\$3,638,073	\$4,338,073
3) Demolish & rebuild on same site & size: 9,740 s.f. @ \$435.08/ s.f., full site haz-mat removal, modest upgrades	\$4,362,679	\$5,062,679
4) Demolish and rebuild on same site with new addition: 10,515 s.f. @ \$435.08/ s.f., modest upgrades	\$4,832,866	\$5,532,866
5) Build new building same size as existing Berger in CAC area, modest upgrades. Demo Berger when done	\$4,495,679	\$5,195,679
6) Build same size on a new site, modest upgrades, add 40 required parking spaces on old putting green to repurpose old Berger into fitness center, library , OVA offices, etc.	\$4,715,429	\$5,415,429
6.1) Same as above, and also add 40 more spaces on old putting green for more meeting rooms classrooms, and other assembly type uses, or CAC future additions.	\$260,000	
6.2) Same as above, and also acquire land behind the CAC and lawn bowling, for future building and/or use expansion.	\$460,000	
*Full upgrade allowances include improved storage, stage & kitchen upgrades, improved audio/visual systems, and higher grade finishes, etc.	\$700,000	

Not addressed: cost of locations for activities/events during the Berger remodel (up to 18 months)

-

Community	Location	Assoc. Fees	HOA Fees	Total Fees
Sun City	Menifee, CA	\$25/month	\$155-\$200/month	\$25 - \$200/month
Jess Ranch	Apple Valley, CA	\$55- \$320/month	N/A	\$55- \$320/month
Oakmont Village	Santa Rosa, CA	\$63.00/month	\$30 - \$280/month	\$63-\$343/month
			majority are \$200+	
The Oasis	Menifee, CA	N/A	\$75 - \$185/month	\$75 - \$185/month
Sun City Lincoln Hills	Lincoln, CA	N/A	\$107 - \$321/month	\$107 - \$321/month
Triology at Rio Vista	Rio Vista, CA	N/A	\$125/month	\$125/month
Sun City Roseville	Roseville, CA	N/A	\$456/quarter (\$152/month)	\$152/month
Woodbridge	Manteca, CA	N/A	\$162/month	\$162/month
Solera at Oak Valley Greens	Beaumont, CA	N/A	\$182/month	\$182/month
Sun City Apple Valley	Apple Valley, CA	N/A	\$184/month	\$184/month
The Colony	Murrieta, CA	\$200/month	N/A	\$200/month
Sun City Shadow Hills	Indio, CA	N/A	\$217/month	\$217/month
Four Seasons at Beaumont	Beaumont, CA	\$226-\$299/month	N/A	\$226-\$299/month
Sun Lakes Country Club	Banning, CA	\$235/month	\$140 - \$150/month	\$235 - \$385/month
Triology at Glen Ivy	Corona, CA	\$256/month	\$108-\$132/month	\$256-\$388/month
Sun City Palm Desert	Palm Desert, CA	\$239/month	\$30/month	\$269/month
Triology at the Vineyards	Brentwood, Ca	N/A	\$272/month	\$272/month
Leisure World Seal Beach	Seal Beach, CA	N/A	\$284 - \$361/month	\$284 - \$361/month
Triology at La Quinta	La Quinta, CA	N/A	\$288/month	\$288/month
Oceana	Oceanside, CA	N/A	\$290-\$325/month	\$290-\$325/month
Triology at Monarch Dunes	Nipomo, CA	N/A	\$315 - \$479/month	\$315 - \$479/month
Casta del Sol	Mission Viejo, CA	\$325-\$330/month	\$15-\$19/month	\$325-\$349/month
Friendly Valley	Newhall, CA	N/A	\$336 - \$364/month	\$336 - \$364/month
Heritage Palms Country Club	Indo, CA	N/A	\$350/month	\$350/month
The Villages Golf and Country Club	San Jose, CA	N/A	\$350 - \$650/month	\$350 - \$650/month
Leisure Village	Camarillo, CA	N/A	\$353-\$533 /month	\$353-\$533 /month
Indian Ridge Country Club	Palm Desert, CA	N/A	\$415 - \$776/month	\$415 - \$776/month
Ocean Hills Country Club	Oceanside, CA	N/A	\$438 - \$448/month	\$438 - \$448/month
Laguna Woods Village	Laguna Woods, CA	\$528/month	\$11 - \$300/month	\$539-\$828/month

Rossmoor

Walnut Creek, CA

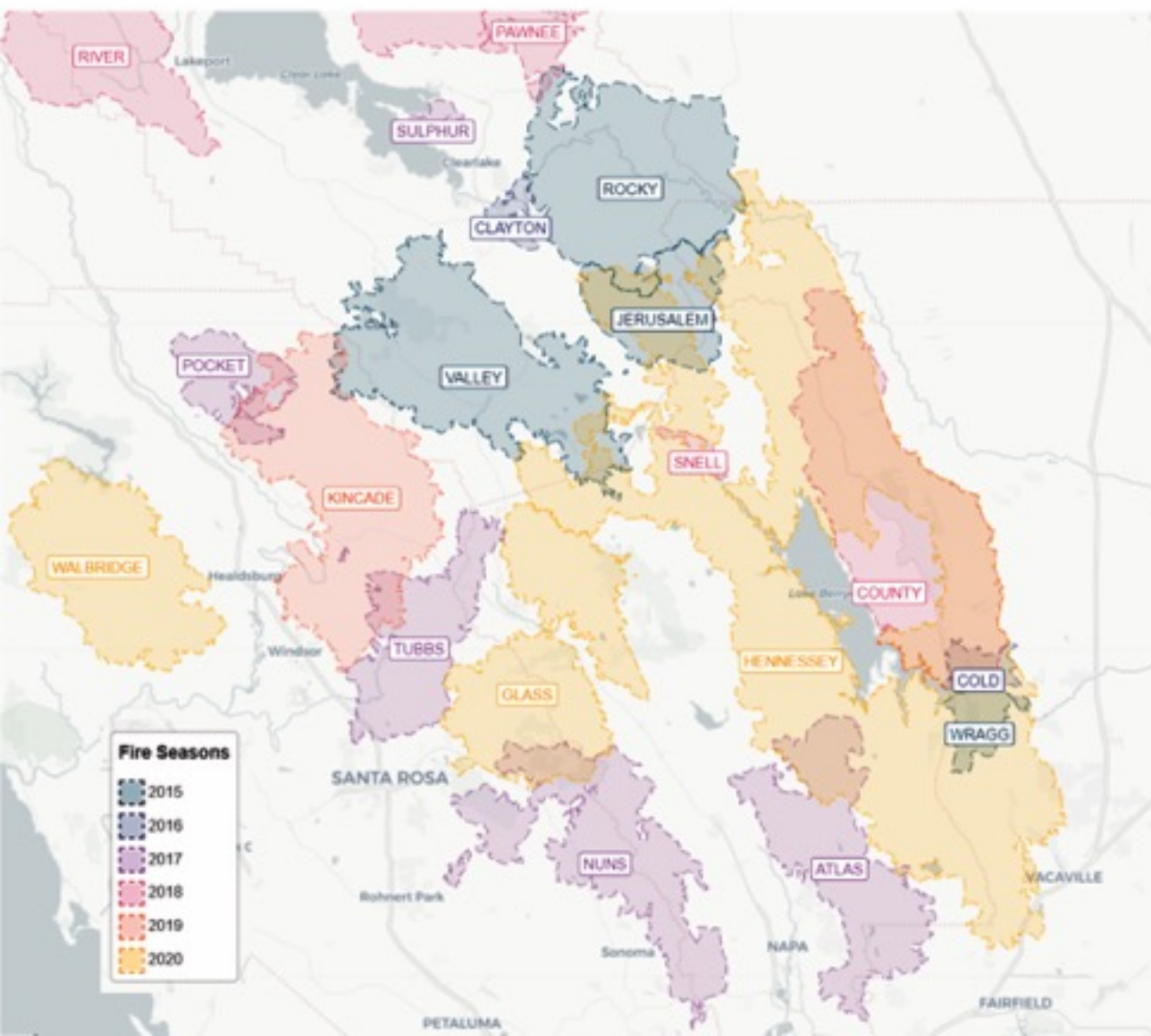
\$550/mo

up to \$250/mo

\$550 - \$800/month

All communities included in this survey have 1000+ residential units currently in place.

Oakmont Recent Fires



Club Survey Analysis Discussion

Presented by Jeff Young

January 2021

DRAFT

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DRAFT

Background

In early November 2020, Jess Marzak and Marlana Cannon contacted me asking if I might be willing to help them analyze data that was collected from a recent survey of Oakmont clubs. The purpose was to understand more deeply about how the clubs are using Oakmont buildings and meeting rooms with an eye toward determining how many meeting rooms are needed to satisfy demand and what kind of building is needed.

In a discussion, Jess, Marlana, and I came up with the following list of more specific questions we thought needed to be answered in order for the OVA Board to make good decisions about what should be done with the Berger/CAC buildings in order to meet the needs of the community. Here is the list of questions we started with:

- How much facility space do we realistically need to adequately serve the community over the next 20 or so years?
 - What is the largest sized gathering Oakmont realistically needs to be capable of supporting?
 - How many meeting rooms of what sizes do we need to adequately support our clubs?
 - How much additional storage space do we need?
- Do we have the space we need in our current facilities, or do we need significantly more space? (Based on data, not someone's opinion)
 - Can we remodel existing structures to get the kind of space we need, or do we need a larger footprint to include the space we need?
- What challenges are our clubs facing - during and after the Covid-19 pandemic?
 - What do we need to provide in our facilities that would help them meet those challenges?

Introduction

The following is a discussion of what I was able to learn from both the survey of Oakmont clubs as well as some research done by Anita Roraus into the records kept from approving new clubs and scheduling rooms for them to meet.

The data collected from the survey is contained in the accompanying spreadsheet "[JSY 12-20 Club Survey Analysis.xlsx](#)" The spreadsheet opens to a summary analysis of the data collected. There are several tabs along the bottom that show additional information including *Room Capacity*, the raw data collected from the survey under the tab labeled *Survey Data*, and groupings of themes identified in comments submitted about concerns and suggestions. We suggest you read these comments and suggestions sorted by theme as they convey useful quotes by the club leadership that cannot be found in the analysis numbers.

The research done by Anita Roraus consists of historical information about clubs and when they were approved by the OVA Board since 2003. This information is contained in the accompanying spreadsheet "[Oakmont Village Approved Clubs History.xlsx](#)." This spreadsheet contains a summary tab, a tab containing a list of current clubs, as well as tabs for lists of clubs approved by the OVA board each year since 2003.

DRAFT

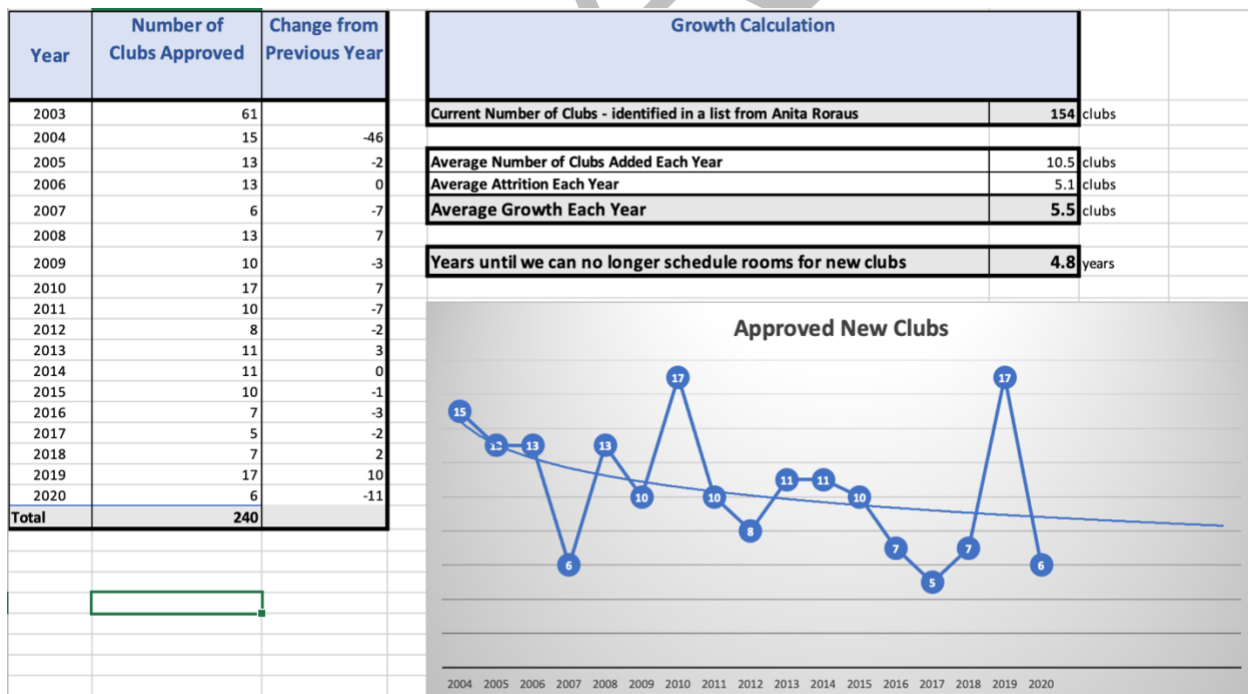
Clubs

Currently, Anita Roraus reports that the **total count of active clubs in Oakmont is 161**, although the current list of active clubs she supplied contains only 154 clubs. Anita is aware of the discrepancy and is trying to reconcile it as of this writing. No matter what the exact number is, an important fact to keep in mind is that before the Covid-19 pandemic, Anita reported that it was becoming very difficult for her to schedule room space. Anita also reports that she thinks scheduling would completely break down as being impossible if we approached 180 total clubs. **So, we appear to be close to reaching a hard limit to the number of clubs Oakmont can support with the current facilities.**

Growth of Clubs

Looking at the *Summary* tab in the Approved Clubs History spreadsheet, since 2003, the OVA Board has approved an average of 10.5 clubs each year. Also important is that since 2003 on average 5.1 clubs must have become inactive each year as well. I say “must have” because there is no record currently kept of clubs becoming inactive – just a record of clubs being approved by the OVA Board. **Even if no record was kept, this number is easily calculated with simple math. This results in an average growth rate of 5.5 net new clubs each year.** It is very clear from this information that we cannot continue to add new clubs much longer given this historical growth rate using the facilities we currently have.

If the hard limit on the number of clubs turns out to be near 180, then we have less than 5 more years before we reach that hard limit, providing that the rate of growth resumes at the same rate after the pandemic is over which it may or may not do.



We Are Already Experiencing the Effects of this Limit on Growth

The data from the survey of clubs shows that 23.4% of clubs report that reservation of their favorite space is currently a problem for them. (Mostly the larger clubs with more than 20 members.) Also,

14.3% of clubs report that the size of current space has been an issue for them. (Again, this is mainly the larger clubs.) So, in both cases, the larger clubs are now starting to experience the effects of getting close to a limit on growth while the smaller clubs are not experiencing it as much.

Size of Clubs

In addition to growing the number of clubs, the survey shows that the size of clubs is growing as well. 49.1% of clubs predict that their membership is likely to grow, while 17.9% of clubs are predicting shrinking memberships. This statistic is more evenly distributed across all club sizes.

Expanding Beyond Oakmont Residents

The survey also shows a large interest (48.1% of clubs) in including non-Oakmont residents in their clubs regardless of the existing size of the club. 38.7% of clubs would like to advertise outside of Oakmont in order to attract new members. So, there exists even more pressure to expand the amount of space we have for club activity as well as the number of rooms available to be scheduled.

Yet, Concerns About Space Still Remain Relatively Low

Even though we are starting to experience the effects of approaching a hard limit to the growth of clubs, there appears to be a fairly low amount of concern being expressed about it. The largest percentage of clubs that expressed a concern about activities, or facilities, both current and future, was a little less than 16% while more than 33% of clubs expressed no concerns in each of the questions asked and 16.5% of clubs expressed a concern about future costs.

Concerns About Future Oakmont Facilities					
Deterioration of Amenities	Availability of Space	More Space	COVID/Safety Issues	Cost	No Concerns
0	3	3	4	4	11
0	1	5	0	4	9
3	3	2	1	8	5
2	2	7	3	2	12
out of 109					
5	9	17	8	18	37
4.6%	8.3%	15.6%	7.3%	16.5%	33.9%

This leads me to speculate that most of the individual clubs are not experiencing significant negative effects of reaching a limit to growth. Why would that be?

Perhaps one explanation could be that the clubs that have been around for a while already have their rooms selected and reserved far in advance and are less likely to feel the effects of reaching a limit to growth. They are running along smoothly based upon what they established a while ago. Instead of the individual clubs experiencing increasing difficulties, the effects of reaching a limit to growth are seen and felt more by the OVA staff that schedules the space or by the larger clubs who are running into a limit to the growth within their individual club.

No matter the cause, it appears from the data that there is less awareness of the need for more space or the availability of space than there is concern for increase costs or no concerns at all.

Capacity

As described in the Background section, we initially wanted to find information in the collected survey data that would allow us to know how many rooms of what sizes we need to adequately support our clubs. What we found instead was that the answer to this question can have many answers depending upon the number of clubs Oakmont wants to support. Clubs have been growing on average by 5.5 new clubs per year since 2003. While there is a trend towards a slowing of growth, we are not seeing that trend reaching zero growth any time soon. This continued growth forces Oakmont to decide on the maximum number of clubs we would like to support.

There will always be a limit to how much capacity our facilities have to serve the needs of our community. Looking at the historical record, demand is likely to eventually fill whatever reasonable capacity we have. We cannot expect to never to run into limits to growth no matter how much we build.

The challenge is to know what capacity in space and availability of meeting rooms is reasonable for a community of our size. Many in Oakmont will have an opinion about our capacity. Large clubs that would like to have even more members will likely want to build a space capable of holding larger gatherings. Those clubs that do not have concerns about outgrowing current space are likely not to see a need to spend millions of dollars on additional capacity they won't directly need. So, how should the Oakmont Board make a decision on capacity?

Capacity for the Berger Center

Currently the Berger Center can hold a maximum gathering of 337 people according to Maggie in the Maintenance Department. When asked directly about a limit of 271 from the Fire Marshall, Maggie specifically backed the 337 number and provided a setup diagram. (See Appendix I for the diagram from Maggie showing the setup for the Berger holding 337 people.) This is 7.14% of Oakmont's population of 4720. There does seem to be some consensus in Oakmont that this capacity might be too low. I have also heard from some that we should have a Berger Center that could hold 10% of the population, or 472 people. Is this the target we should be building for, or is there an even more appropriate number? Can *anyone* know for sure that 10% of our population is a significantly better number than 7.14%? I can still imagine a community issue that would still fill a facility that holds 472 people and not accommodate all that might want to attend. Could we make the Berger Center large enough to guarantee that all that want to can attend such an important issue? This is probably an unreasonable desire. So, how do we choose a reasonable number?

There are other retirement communities that do have facilities that hold a much larger percentage of their population. For example, Sun City in Arizona has an amphitheater that holds 3,500 people out of a population of 27,500 which is 13% of their population. Do they experience issues or events that require turning away residents?

My experience informs me that architects have developed many resources and rules of thumb that help them with decisions on capacity. They deal with this problem on many levels no matter what they are designing. For example, they need to know how many bathroom stalls to build for each gender that would work well for the size of a building they are designing. While we all have experienced long lines at public restrooms, I still expect that architects would be a much better resource for deciding what might be a reasonable capacity for a community of our size rather than engaging in a competition of opinions between Oakmont residents which is sure to generate conflict

and division within our community. Choosing a neutral authority with experience in answering these kinds of questions seems to me a better way forward than having committees or the Board decide based upon our own opinions and generating disagreement within the community when those opinions cannot be shown to be more than personal opinion.

Capacity of Meeting Rooms

As is true for the capacity of the Berger Center, meeting rooms and their capacities are an important factor in choosing what we might want to do with the Central Complex. I do not see much specific data gathered in the survey of clubs that would give additional clarity as to how many meeting rooms Oakmont needs or their size that would better inform the Board and avoid the conflict generated by a competition of personal opinions.

According to Anita and Maggie, we are currently scheduling the following rooms for events:

Meeting Room	Capacity
Berger Center	337
Room D	25
Room G	25
Fireside	25
CAC/Room B	30
CAC/Art Room	23
CAC/Card Room (A&B)	52
East Rec Main	120
East Conference Room	30
West Rec Upper	117
West Rec Lower	25
OVA Large Conference Room 1	12
OVA Large Conference Room 2	12
Manager Conference Room	7
OVA Suite B	35

Just as in the case of the capacity of the Berger Center, utilizing the resources of architects that plan for communities such as ours seems to be a much more reliable way of choosing the capacity of meeting rooms appropriate for a community of our size. We know the number of rooms we have, the capacity of each room, the number of clubs we currently have and our expected growth. It seems to me that a competent architect would be able to offer a more scientific estimate as to whether what we have is significantly too low for our community and a reasonable estimate for what might work better for us given our choice as to how many clubs we would like to support as an upper limit.

Raising Awareness of Limits within the Community

No matter the limit on the number of clubs we can reasonably support, one important learning from the survey data is that even when we do get close to a limit, the community and many of the clubs may not be aware that there is a significant issue. Even if the Board chooses to take action and add

additional capacity, the community and the clubs are not likely to support that decision unless it becomes clear that something important is broken and needs to be fixed.

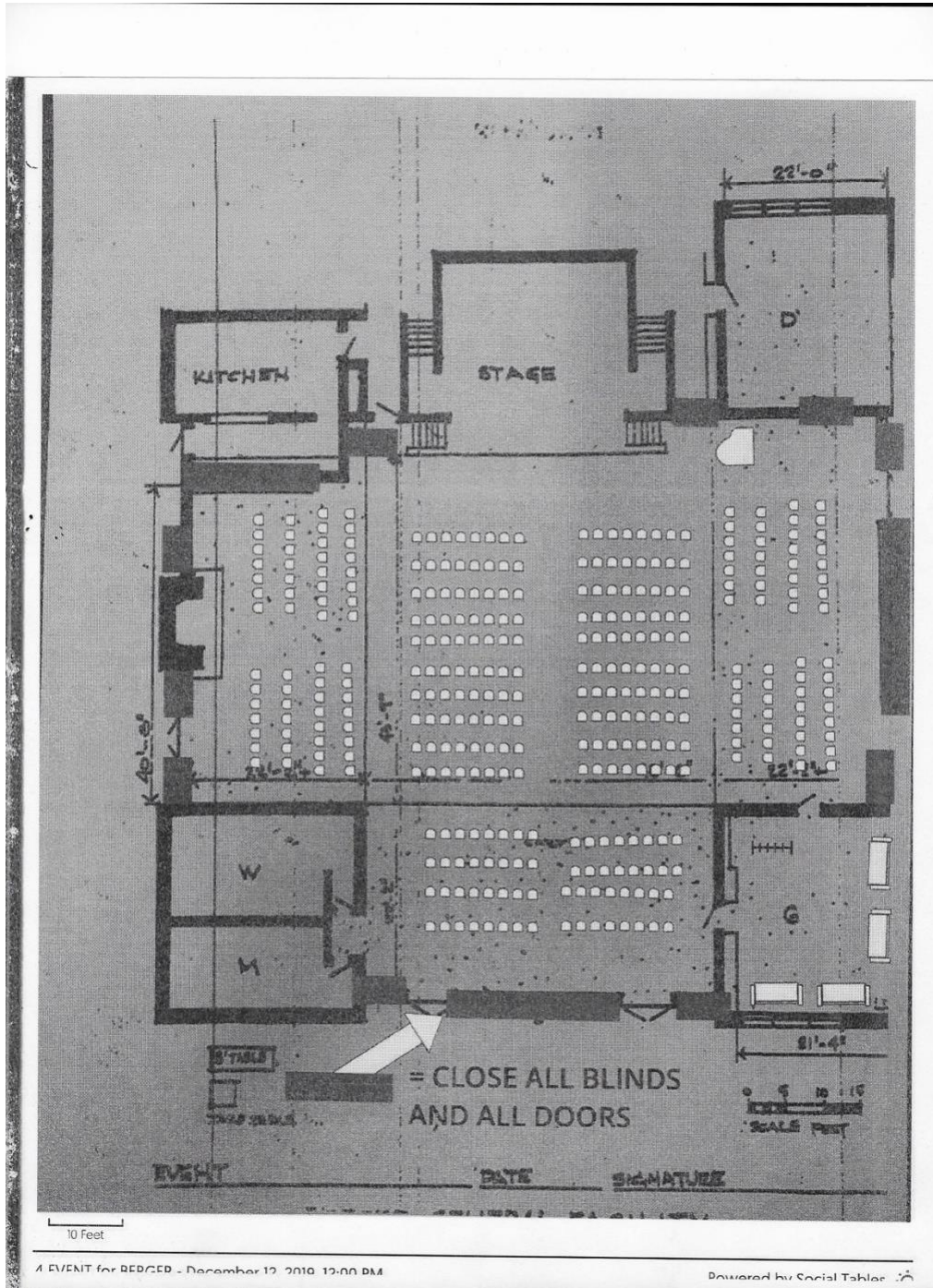
Conclusion

There is interesting and useful information that can be gleaned from the survey data generated by the clubs as well as the data supplied by Anita and Maggie. The purpose of gathering this data and this Analysis Discussion is not to come to a decision on the answers to the questions listed in the Background section. The intention is to highlight anything of interest in the survey data that might be useful in deciding upon good answers to those questions. So, to summarize what we learned from the data:

1. The number of clubs within Oakmont is currently 161 and is significantly close to a hard limit of somewhere near 180 clubs before Anita can no longer successfully schedule room space.
2. The number of clubs has been growing, on average, at a rate of 5.5 net new clubs per year since 2003.
3. We can't keep this rate of growth up very long before scheduling meeting rooms breaks down entirely.
4. There is strong interest in the community of not only growing the number of clubs, but growing the size of some clubs, including the desire to invite non-Oakmont members.
5. There is little awareness within clubs, and probably in the community as a whole, that we are reaching a hard limit on the number and size of clubs. This is likely to result in a lack of community support of large expenditures to increase our capacity for more community space.
6. A reasonable estimate as to the amount of space needed for community gatherings and club activities that would hold up to scrutiny by the community is not easily decided by Oakmont residents and the data does not reveal clear help on arriving at a reasonable estimate. Instead, it is my own suggestion that architects might be a more reliable resource for estimating the size of community gathering space as well as the number and size of meeting rooms given our population and our chosen maximum number and sizes of clubs.
7. We need to raise awareness within the community that we are currently experiencing difficulties in scheduling space. More awareness within the community might generate more support for fixing the problem when the time is right for doing so.

Appendix I

A diagram supplied by Maggie Vera showing the setup that would support 337 attendees within the Berger Center.



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NEIGHBORHOOD CONTEXT MAP

MAY 2017