

Saratoga Retirement Community
Residents' Association Expansion Sub-Committee

Report on the SRC Expansion Survey

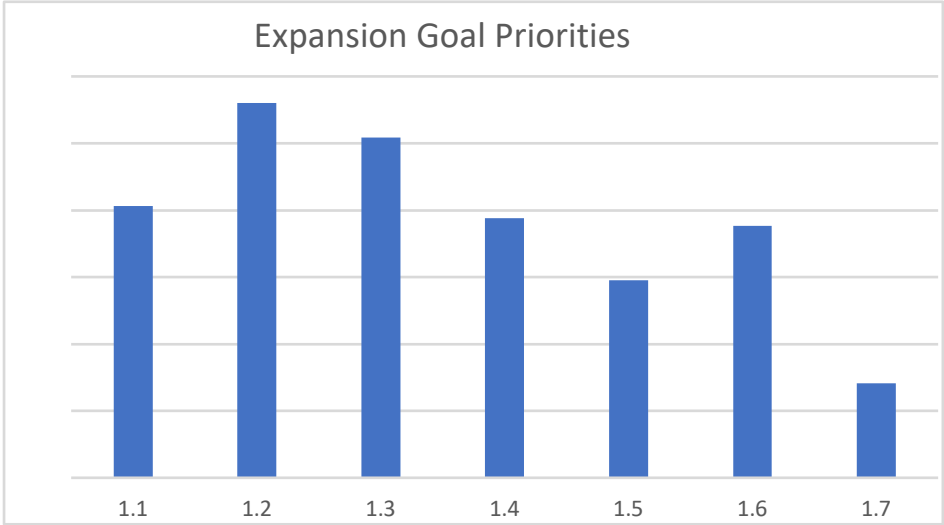
Appendix 1, Detailed analysis of responses

Introduction

The questionnaires for this survey solicited the respondents' rating of two different expansion plans (designed by PRS and by the "Preserve SRC Campus" group of residents) and of an additional statement submitted by one resident. Respondents were asked to write in their comments on these plans so as to provide a better understanding of the reasoning behind their ratings of the different proposals. Respondents provided a total of 1122 comments, a verbatim record of which can be found in Appendix 4 to this report. For each question on which comments were provided, a content analysis was performed to obtain coherent clusters of issues ("Themes") that were of concern to respondents. This report provides a systematic "map" of these themes for each of the questions or sub-questions. For each question, the total number of comments submitted is indicated; since many comments addressed more than one issue, the summation of the numbers in the detailed breakdown sometimes exceeds the total number for a given question. Clusters of issues with a particularly rich supply of comments have been marked in this report as "Principal Themes"; other clusters have been recorded as "Additional themes". Each Principal Theme is accompanied by a listing of specific issues that pertain to that Theme. The numbers given in this listing serve as an indication of the frequency with which issues and themes occur in the responses.

Question 1 - Expansion Priorities

170 residents completed question 1 giving priorities to the various identified goals. The following histogram aggregates the priorities that residents assigned to each goal, with priority 1 being given a weight of 6, priority 2 a weight of 5, etc.



Legend

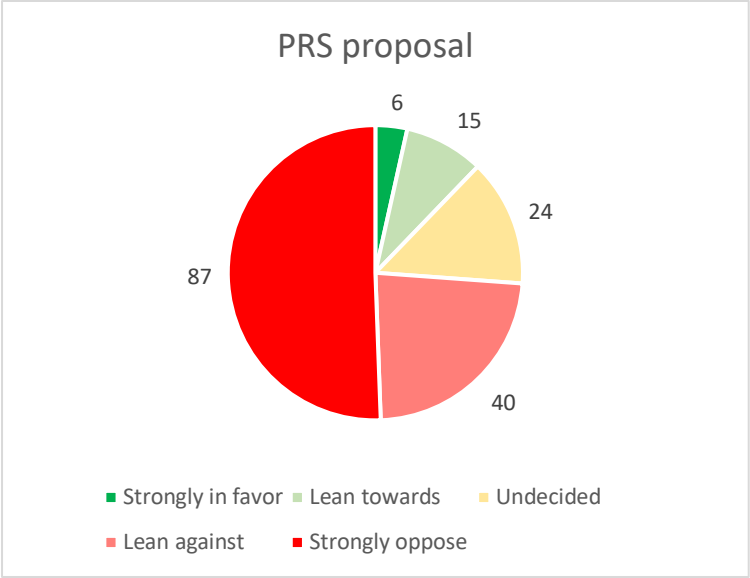
1.1	To significantly improve the facilities for skilled nursing
1.2	To preserve the natural environment of the SRC campus
1.3	To assure the long-term financial viability of SRC
1.4	To make sure that facilities for serving a larger resident population (dining, fitness, open-air activities, meetings, walking, library) are adequate
1.5	To solve the parking problems on the campus
1.6	To bring the available facilities (Independent Living, Assisted Living, Health Care Center) in line with future (internal and external) demand
1.7	(Write-in)

The various write-in goals have been analyzed to identify the main themes. The full list of write-in goals is given in Appendix 4. The following themes reflect write-ins by respondents identifying goals in addition to the goals listed above. The listing below includes only goals mentioned more than once. The number in parentheses indicates the number of times that the goal was identified. The second column gives the number of mentions at each priority rank; the superscript following the number of mentions indicates priority rank (e.g., 1³ indicates one mention ranked 3rd in priority).

Goal theme	Assigned priorities
Preserve park (6)	4 ¹ , 2 ⁵
No building in front of Manor (5)	2 ¹ , 1 ² , 1 ³ , 1 ⁴
Minimize campus disruption (4)	2 ¹ , 1 ² , 1 ³
New and better HCC (4)	1 ¹ , 1 ² , 1 ³ , 1 ⁴
Modernize AL (3)	1 ² , 2 ³
Build IL unit near creek (2)	1 ⁵ , 1 ⁶
Preserve trees (2)	2 ²
Preserve rural setting (2)	2 ¹
More parking (2)	1 ² , 1 ³
Lower monthly cost (2)	1 ¹ , 1 ⁶
Avoid infill development on campus (2)	2 ¹
Preserve/improve dining (2)	1 ¹ , 1 ⁶
More staff for dining (2)	1 ⁵ , 1 ⁶

Question 2 - PRS Proposal

172 residents answered this question, giving their views on the PRS proposal. The following chart gives the number of residents in each response category:



This section gives an analysis of the comments provided in questions 2.1, 2.2 and 2.3 to identify the main themes of these comments. The full list of comments for each of these questions is given in Appendix 4.

Question 2.1 – Reasons for rating of the PRS proposal (144 entries)

N.B.: For this question it made sense to group the respondents' added comments by the ratings of the two proposals (Strongly in favor; Leaning towards; Undecided; Leaning against; Strongly opposed)

2.1.1 Respondents strongly in favor of the PRS proposal (6)

ADDITIONAL THEMES: Financial (cash flow) and organizational advantages (2); PRS expertise (2); Single rooms in HCC (1)

2.1.2 Respondents leaning towards the PRS proposal (12)

PRINCIPAL THEME: Experience of PRS (6)

ADDITIONAL THEMES: Seek better location of new buildings (3), but preference for re-zoning gully (1); Residence affordable for more people (1); Meets unmet needs (1)

2.1.3 Respondents who are undecided (13)

PRINCIPAL THEME: Both proposals have problems, no plan is perfect (5)

PRINCIPAL THEME: Need more information (3)

ADDITIONAL THEMES: Favorable on PRS experience (2); Unfavorable on PRS experience (2); Will be long gone by the time of completion (1)

2.1.4 Respondents leaning against the PRS proposal (38)

PRINCIPAL THEME: Destruction of environment (Park, trees, green space) (19)

PRINCIPAL THEME: Too many, poorly planned buildings (12)

ADDITIONAL THEMES: Unfavorable views of PRS (5); Plans for HCC inadequate (4); Lacks information (4); Disruption of campus during construction (3)

2.1.5 Respondents strongly opposed to the PRS proposal (75)

PRINCIPAL THEME: Destruction of campus environment (Park, trees, green space) (44)

PRINCIPAL THEME: Too many, poorly planned buildings (28)

ADDITIONAL THEMES: Disruption of campus life (8); Unfavorable views of PRS (8); Plans for HCC inadequate (6); Lacks information (4); Alternative plan better (3); PRS' expertise (1); Misc. deficits (AL problems, increased cost, marketing problems) (3)

Question 2.2 – Strengths of PRS proposal (109 entries)

PRINCIPAL THEME: Gaining added facilities (22)

- Added Parking 6
- More exercise space 4
- More space 3
- Added dining facilities 2
- General improvement 2
- New Auditorium 1
- Emergency exit 1
- Improved facilities 1
- Enlarged Barnes space 1

PRINCIPAL THEME: Improvement of HCC (15)

PRINCIPAL THEME: Enhanced financial viability (10)

- Responds to increased demand 9
- Expansion of membership 1

PRINCIPAL THEME: Experience of (PRS/SRC) management (6)

ADDITIONAL THEMES: Making Money for PRS (4); None/No strengths/NIL (35)

Question 2.3 – Weaknesses of PRS proposal (127 entries)

PRINCIPAL THEME: Campus degradation (52)

Loss of green space, established trees, natural environment 36

Obstruction of Manor 8

Destruction of Memorial Park 8

PRINCIPAL THEME: Creating high-density campus (24)

High-density housing 20

Poor planning of space 4

PRINCIPAL THEME: Poor solution for Health Care (16)

HCC not first priority 1

Poor solution for HCC 14

No solution for AL 1

PRINCIPAL THEME: Poor record of PRS (12)

Past record of PRS 5

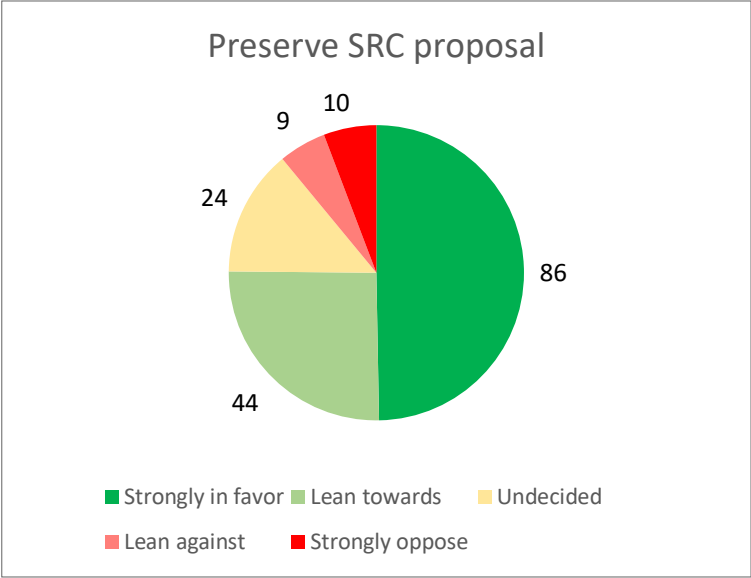
Disregard of residents' interests 6

“Odd Fellows have not seen ‘Preserve SRC’ proposal” 1

ADDITIONAL THEMES: Financial problems (11) (Ignores marketing factors, Lack of information, Lack of cost information, Problem of fee funding, “Greed”); Disruption during expansion (10) (Disruption, noise, dust); General objections (20) (Poor aesthetics, Disregarding quality of life, Ill conceived, Not why we came here, Change of atmosphere on campus, Overall rejection: “all of it”, “hard to pick just one”, “will not pass”)

Question 3 - Preserve SRC Alternate Proposal

173 residents answered this question, giving their views on the Preserve SRC Alternate proposal. The following chart gives the number of residents in each response category:



This section gives an analysis of the comments provided in questions 3.1, 3.2 and 3.3 to identify the main themes of these comments. The full list of comments for each of these questions is given in Appendix 4.

Question 3.1 - Reasons for rating of the “Preserve SRC” proposal (131 entries)

N.B.: For this question it made sense to group the respondents’ added comments by the ratings of the two proposals (Strongly in favor; Leaning towards; Undecided; Leaning against; Strongly opposed)

3.1.1 Respondents strongly in favor of the “Preserve SRC” proposal (69)

PRINCIPAL THEME: Protects and preserves green space on campus (21)

PRINCIPAL THEME: Preserves quality of life on campus, minimizes disruption (19)

PRINCIPAL THEME: Favorable assessment of plans for new HCC (11)

PRINCIPAL THEME: Overall quality of expansion plan, building location (14)

ADDITIONAL THEMES: Preserves heritage and historical elements (6); Takes residents’ interests into account (5); Meets goals of PRS plan better or as well (5); Should help marketing (2)

3.1.2 Respondents leaning towards the “Preserve SRC” proposal (33)

PRINCIPAL THEME: Favorable assessment of plans for new HCC (11)

PRINCIPAL THEME: Overall quality of expansion plan, building location (9)

ADDITIONAL THEMES: Protects and preserves green space on campus (7); Meets goals of PRS plan better or as well (5); Minimizes disruption (2)

3.1.3 Respondents who are undecided (13)

PRINCIPAL THEME: Both proposals have problems (3)

PRINCIPAL THEME: Need more information (3)

ADDITIONAL THEME: Shows not enough experience (1); Concern over new HCC (multi-floor) (1); Entire program not needed (1)

3.1.4 Respondents leaning against the “Preserve SRC” proposal (6)

PRINCIPAL THEME: Concerns with building placements (3)

ADDITIONAL THEMES: Need more information (2); Plan protects and preserves green space (sic) (1)

3.1.5 Respondents strongly opposed to the “Preserve SRC” proposal (10)

PRINCIPAL THEME: Anticipating financial problems (unacceptable to OFHC, effect on future fees, cost of poor architectural planning, dubious funding streams, not financially viable) (7)

ADDITIONAL THEMES: Lack of experience (2); Doubts about plans for HCC (2); Favorable views of plan (2); Resistance from PRS (1)

Question 3.2 – Strengths of Preserve SRC proposal (119 entries)

PRINCIPAL THEME: Best plan for SRC’s future (37)

Balances need for more IL units with maintenance of quality of campus life 9

Better use of available space 15

Does all the PRS plan does without so much impact 3

Attractive alternative to PRS plan 3

Fewer buildings 3

Innovative thinking 2

Growth without losing ambiance and historical value 1

Better utility *and* aesthetics 1

PRINCIPAL THEME: Preserves natural environment/green space/trees (33)

PRINCIPAL THEME: Provides new and modern Skilled Nursing Facility (28)

PRINCIPAL THEME: Advantages for residents (12)

- Least inconvenience to residents 4
- Less disruption from construction 3
- “In line with my needs” 1
- Good potential for Building D 2
- Correcting existing problems (Parking, access) 2

ADDITIONAL THEMES: Preserves valuable facilities/properties (9) (View of Manor, Keeps campus as intended, Preserves Historical Park, Preserves Bocce courts); Plan created by residents (8) (Based on “customer feedback”, Created by residents, Praise for Preserve initiative, “Makes Nimbyism happy”); Financial advantages (4) (Increases revenue, Greatly reduced cost, Adds more places); No strengths (2)

Question 3.3 – Weaknesses of Preserve SRC proposal (97 entries)

PRINCIPAL THEME: Questions on financial and cost projections (17)

PRINCIPAL THEME: Problems with plans for new HCC (15)

- Financial issue: Construction cost with no increased revenue 1
- Operating problems 13
- Problems of tearing down old HCC 1

PRINCIPAL THEME: Specific planning deficits (9)

- “Big Hill to climb for dinner” (from new IL Building) 2
- Omission of a more spacious alternative concept for Building C 1
- Distance of new IL units from Manor and dining 1
- Location of new Auditorium 1
- Neglect of needs (dining, AL, etc.) of larger residential population 3
- “Unnecessary new Fitness Center” 1

PRINCIPAL THEME: Questions about expertise (8)

- Lack of experienced professional input 6
- Lack of understanding of CCRC rules, corporate business 2

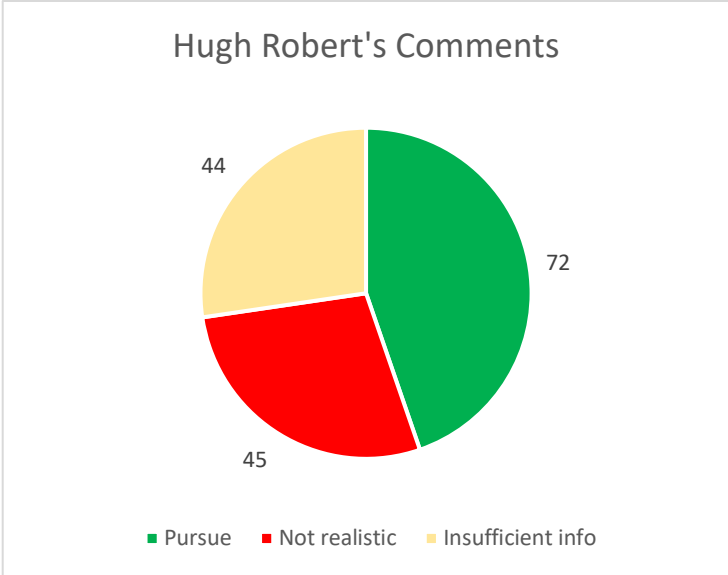
PRINCIPAL THEME: Role of PRS (8)

- Difficulty to bring PRS to a compromise 3
- Lack of PRS’s and OFHC’s attention to “Preserve” plans 3
- “Preserve” proposal too late in the process 1
- Plan “not thought of by PRS” 1

ADDITIONAL THEMES: Problems of overall scale (4) (Still too big”, “Too many buildings”, Opposed to any new construction, Might take longer); Residents’ issues (3) (Residents may have no voice in the project, “Preserve SRC” plans were not well known); No weaknesses (20)

Question 4 - Hugh Roberts' Comments

161 residents answered this question, giving their views on Hugh Roberts' comments. The following chart gives the number of residents in each category:



Beyond the three given options given in the questionnaire, write-in comments on Hugh Robert's comments were not specifically solicited. However, 17 residents provided comments on their own. This section gives an analysis of these comments to identify the main themes of these comments. The full list of comments on Hugh Roberts' comments is given in Appendix 4.

THEME: Doubts about HR's esteem for PRS

- PRS disregards the need for residents' "buy-in"
- Don't discuss expansion until wasteful management is improved
- Doubts whether PRS are "experts" – poor record of managing retirement homes
- HR "kicks can down the road" – Don't penalize current residents for poor decisions by PRS on HCC
- Consider opposing PRS expansion plan in (City's) Planning Committee
- There has been no previous survey of residents that indicated consent with what PRS is now planning – Preserve SRC is better in that it limits construction to one side of campus
- Too much trust in PRS
- Concern with long-term cost for residents
- We will give up the quality of life that made us come here

THEME: Agreement with HR's concept of the role of PRS

- "This is a job for PRS"
- Waiting is not an option

THEME: Agreement with need for residents and PRS to work together

Not “them” vs “us”

Patience and more possibilities

Since expansion will happen, HR’s position has merit

Have the city forbid building on the Historic Park is not a smart idea, but neighborhood organization can be effective

THEME: Specific suggestions

Agree with need for 2nd access

Spare the Park and enlarge Building C

Question 5. – Need for additional information

50 residents answered this question, giving their views on needed additional information. This section gives an analysis of these comments to identify the main themes of these comments. The full list of comments is given in Appendix 4.

PRINCIPAL THEME: Need more and better information on cost and financing (24)

- Need for more financial and cost data 19
- Numbers and facts behind PRS plans 1
- Can 52 units be added and the Park saved? 1
- Better and cheaper ways for Fitness Center expansion 1
- Financial analysis of proposals for NOT expanding SRC 1
- Comparisons with other similar campuses 1

PRINCIPAL THEME: Need more detailed information about plans and implementation (9)

- Exact time lines and dates 1
- Details of units in PRS plans 1
- Plans for staffing a larger campus 1
- 3-D model of both expansion plans 1
- How to protect HCC residents during HCC re-construction 1
- Alternative/additional sites for parking above and below ground 1
- Any plans for solar power 1
- Alternative plans? 1
- Survey data on what residents want 1

PRINCIPAL THEME: Need information about actors 7

- Constraints imposed by the City 1
- Experience of PRS architects 1
- OFHC's knowledge of, and involvement in, expansion debate 3
- PRS: Willing to work with residents? 1
- PRS: Do they have alternative plans? 1

ADDITIONAL THEMES: Projections of demand (5) (Need for more market studies, Effects of expansion on marketing, Statistics on IL moving to AL and HCC, Population projections by IL, AL, HCC); Natural environment information (4) (Actual tree impact of each option, Arborist's report on tree removal, Plans for preservation of natural environment); No further information needed

Question 6 – Personal benefits and downsides and other comments

Question 6.1 – Greatest personal benefit from expansion

109 residents answered this question, giving their views on the greatest personal benefits from expansion. This section gives an analysis of the answers to identify the main themes of these answers. The full list of answers is given in Appendix 4.

PRINCIPAL THEME: Financial advantages (33)

Financial stability/viability (of SRC) 24

Fee control 6

Keeping costs down 1

Staying competitive 1

“Allow aging in place” 1

PRINCIPAL THEME: Getting a modern/state-of-the-art Skilled Nursing Facility 27

PRINCIPAL THEME: Getting improved, expanded facilities 30

Fitness Center expansion/improvement 8

More dining facilities 5

Better Assisted Living 5

More parking 5

Upgrade open space for sports 2

Larger/better meeting facilities 2

Better/safer emergency exit (Chester) 2

“Cultural Center” 1

ADDITIONAL THEMES: Political benefits (1) (More units for Saratoga’s housing quota); Misc. improvements (11) (Meeting more people, “Preserving historical park”, “Better facilities without harming our present way of life at SRC”, “Benefits will only accrue if expansion equates to better quality or lower cost”, Better use of space, “Entertainment”, “Upgrade”); No benefits (25)

Question 6.2 – Greatest downside from expansion (112 entries)

112 residents answered this question, giving their views on the greatest personal downsides from expansion. This section gives an analysis of the answers to identify the main themes of these answers. The full list of answers is given in Appendix 4.

PRINCIPAL THEME: Degradation from extended construction (71)

Construction 32

Noise, Dust 18

Disruption of campus life due to construction 19

“Had enough construction already” 2

PRINCIPAL THEME: Degradation of campus (43)

- Negative environmental impact 18
- Degradation of campus 5
- Increase in traffic 9
- Aesthetic degradation 3
- Damage to historical grounds and buildings 5
- “Loss of peace and quiet” 1
- “The SRC we love would be gone” 1
- Emergency evacuation problems during construction 1

PRINCIPAL THEME: Crowding (15)

- Too many people, high density, loss of space 15

ADDITIONAL THEMES: Financial implications (7) (More expenses for residents, Damage to marketing from construction, disruption, Unforeseen delays); Other downsides (3) (Divisiveness created by expansion plans, No updating of HCC to single rooms); No downside (1)

Question 6.3 - Additional comments (53 entries, excl. of 17 comments on Hugh Roberts)

53 residents answered this question, excluding 17 answers that commented on Hugh Roberts’s comments. This section gives an analysis of the comments to identify the main themes of these answers. The full list of comments is given in Appendix 4.

PRINCIPAL THEME: Concerns over campus quality (14)

- The value of a serene, beautiful campus (“37-acre showplace”) 4
- Preserve uniqueness of campus to attract people 2
- Is expansion of SRC necessary? 1
- Preserve the Park 1
- Improve landscaping 1
- Need more of a “sports complex” (bocce, putting, exercise) 2
- Look at the competition 1
- Fear of disruption (congestion, construction, noise, dirt) 2

PRINCIPAL THEME: Political and financial considerations (13)

- Critical comments on PRS’s role (profit interest; disregarding residents’ interests (“do not listen or care”); need to keep residents involved in planning; need to try to find compromise; disrespectful of “Preserve SRC” proposals; need more open debate on expansion) 9
- Critical comments on “Preserve SRC” (limited experience; need to find compromise) 2
- Financial considerations (“Digging a huge financial pit when the economy goes down”) 1
- Extensive critique of the financial calculus underlying both the PRS and the Preserve SRC proposals (in a lengthy statement submitted by one respondent): No solid projection of financial futures and of the need to replace loss of HCC income by increase in IL income; need to find additional dining and public space available in underused space of the Manor; cost savings in SRC operations possible; some cost increases may still be unavoidable; conclusion: Fix HCC and keep overall size of SRC. 1

PRINCIPALTHEME: Comments/suggestions re plans for buildings (9)

- Reduce number of new buildings 1
- Critique and suggestions re Bldgs A and B (in PRS plan) 2
- Suggestions for new IL Building 1
- Garage proposal on the site of the entry parking lot 1
- Concentrate construction on East side of campus 1
- Pursue re-zoning for alternative building site (in “gulley”) 1
- Need for a “casual restaurant” 1
- Need for 3-D model of alternative proposals 1

PRINCIPAL THEME: Modernize and improve medical facilities (7)

- HCC: Need to modernize and properly locate 3
- “Band-aiding HCC is not the answer” 1
- Improve emergency exit situation 1
- Bring all facilities to 21st century standards 1
- Update and expand AL 1

ADDITIONAL THEMES: General views on expansion (3) (Expansion should not compromise residents’ quality of life, Plan for more than 20 years, Need more open debate on expansion);
Commending the survey (2)