

# **Friends House Master Plan**

## **Friends Association of Services for the Elderly – Planning Committee**

### **Introduction<sup>‡</sup>**

This Master Plan document is the “Master Plan” referenced in the FASE Long Range Plan item #1 and outlines the scope of FASE’s operation at Friends House in Santa Rosa. This Master Plan addresses both the intended physical size and layout of Friends House and the quality of residential life, services, and programs FASE hopes to achieve or offer at Friends House.

The body of this Master Plan is, as yet, an outline. The outline contained herein elaborates items to a limited detail, and some changes are likely in the details as Friends House evolves in the coming decades in response to technology, regulation, and needs of the community.

An overriding consideration in this Master Plan is to retain, preserve, or enhance the basic character and philosophy by which Friends House was created and intends to operate. This character is summarized in the mission statement for FASE\*:

**Friends Association of Services for the Elderly (FASE) seeks to provide high quality residential, health, and social services to the elderly and the disabled at the lowest feasible cost, while emphasizing the highest degree of independence possible. These services are provided in accordance with Quaker faith and practice in which everyone is treated with dignity and respect.**

**As an institution based on Quaker principles, FASE seeks to foster a sense of community in its programs and to integrate its housing and social service programs with the wider Quaker and Sonoma County communities.**

Preservation and enhancement of the sense of community at Friends House is paramount, especially as Friends House evolves: Friends House is and should remain a supportive community based in the principles of Quakers in which each individual is honored and upheld within the corporate community, even when an individual may experience setbacks or limitations as he or she grows older living at Friends House. As initiatives are undertaken, our intent, as the FASE Board, is to expect that residents will find their lives sustained and broadened in a community in which each resident can expect to know and appreciate the gifts of each other resident and to enjoy opportunities for engaging in activities with the other residents.

The FASE Board has, in recent years, approved significant policy statements which provide a context for changes in Friends House and growth of its campus and programs. The key policies pertaining to the scope of this Master Plan are highlighted below.

The Board policy on overall growth in the campus now limits expansion of the campus from its current size to include (eventually and possibly) the lots to the south of the campus on the gravel road/driveway off Rinconada plus possibly including the rear of a property on Benicia<sup>†</sup>. (Of the lots on the gravel driveway, one lot was purchased and incorporated into the

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<sup>‡</sup> This introduction is taken from the Introduction to the FASE Long Range Plan dated January 2008 and modified slightly for use here.

\* October 5, 2002 – #02:60

† March 12, 2005 – #05:09

existing campus, one lot is owned by FASE but not incorporated, and two additional lots are still privately owned.) Thus FASE is not interested in incorporating the single-family residences along Benicia or Rinconada near the corner of those streets nor any of the land to the north which is part of the possible Montecito development. Development of Montecito Shopping Center should be monitored with consideration of possible opportunities for Friends House without expectation that FASE would own or directly operate programs there. (The other boundaries are the existing ones of Benicia and the creek.) See the map on the next page for a representation of Friends House and adjacent properties. The Board discussion and policy are:

The [Planning] Committee has been looking forward twenty or thirty years regarding what services we should be offering at Friends House. They see health care of some sort, assisted living and what we know now as independent living. All of this requires adequate space, including space for support (e.g., corporation yard). They expect that assisted living will be larger than it is now and that health care may well be smaller. The Committee has considered what the physical size or footprint of Friends House should be to meet our needs. The Committee now believes that we should replace our former policy of acquiring any contiguous land with one of acquiring land that would allow the southern boundary of Friends House to be along Dutcher Creek. This means that we would want to acquire the Radic property and possibly the Westley property. (We have recently acquired the Taylor property.) ...<sup>‡</sup> Eventual acquisition of the back part of the Bogardus property is desirable, but not essential. The single family homes to the south of the former Boles property are not of interest to us. Development of Montecito Shopping Center should be monitored with consideration of possible opportunities for Friends House.

**The Board approved limiting possible growth of Friends House to rural residential property to the north of Dutcher Creek, excluding property on Benicia Drive south of 614 Benicia Drive and property on Rinconada Drive [between the gravel access road and the corner of Benicia].**

More recent Board policy on the size of the facilities, in terms of the number of residents who might live on the campus, calls for at most a moderate increase in the population\*. This is embodied in the following FASE Board policy “to guide development of the master plan”:

**Friends House should provide residential apartments for elders who are living independently. Friends House should also provide assisted living services. Between residential apartments and assisted living, Friends House should provide space for between 100 and 120 residents.**

**Friends House should expand its assisted living units for those apartment residents and others who need a higher level of services. Any new construction should provide for flexibility of use. Some assisted living services may be provided in the residential apartments.**

**A facility for skilled nursing services should continue.**

**Friends House should encourage palliative care and end of life programs.**

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<sup>‡</sup> The sentence here in the minutes may well have been retracted by subsequent Board discussion and/or action: In the long-range, the Bambi Lane properties, which cannot be zoned as other than single family homes, probably could be phased out of Friends House residential use with consideration given to selling those to finance purchase of the southern properties.

\* October 7, 2006 – #06:33

**As time and resources permit, Friends Association of Services for the Elderly should explore adding a dementia [care] unit to its programs.**

**In all development, existing sense of community and quality of life should be preserved or enhanced. Environmental impacts of any development should be considered, including the increased use of renewable sources of energy.**

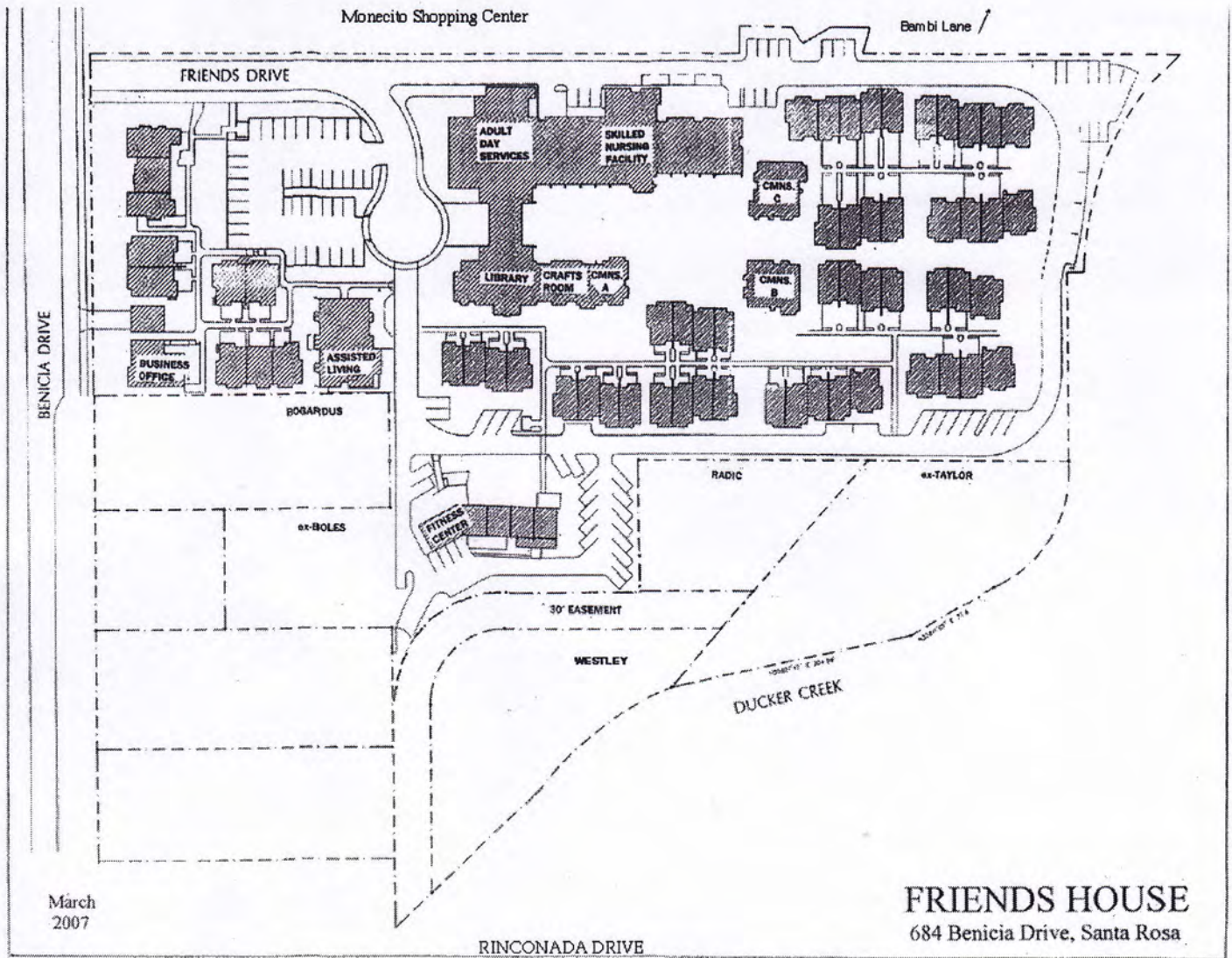
**In achieving these goals, Friends House should consider collaborative programs with others.**

Thus when developing the Master Plan and putting it into action, these polices and our overriding concern for the welfare of the community and the feeling of living in a small Friendly community will, we trust, prevail.

Friends House intends to operate in conformity with applicable regulations of the State of California, including California Department of Social Services and any other agencies which grant licenses or permits to Friends House.

### **Map of Friends House Area**

Friends Association of Services for the Elderly – Planning Committee – Master Plan



March  
2007

**FRIENDS HOUSE**  
684 Benicia Drive, Santa Rosa

## Friends House Master Plan

### I. Residences

#### A. Residential Apartments

1. The admissions process seeks to find a fit between applicant's savings, income, and health insurance coverage and the costs of Friends House services at all levels of care over the lifetime of the resident at Friends House.
  - a. Entry fees into an apartment or house, and costs of monthly fees, vary by the number of square feet in the residence and are set by the FASE board annually.
  - b. Alternative financial arrangements may be introduced in the future for new apartment residents, pending further analysis and approval by the FASE board, possibly including
    - 1) Rental (month to month or annual lease without entrance fee),
    - 2) Carrying charges,
    - 3) Co-housing, and
    - 4) Cooperative housing.

#### B. Higher Levels of Care in a separate service center (RCFE): Assistance Beyond that Possible in Residential Apartments (Monthly fee; currently an Assisted Living CCRC-licensed facility)

1. Private insurance
2. Private pay

#### C. Highest Level of Care in a separate service center: Assistance including Nursing Care (Daily fee; currently a Skilled Nursing Unit [Health Care Unit] separately licensed)

1. Private insurance
2. Medicare
3. Private pay

### II. Health

- A. The physical, spiritual, and emotional health of all residents are the primary focus of the staff at Friends House.
  1. Food Service is provided from a central kitchen at advertised prices.
    - a. Meals can be delivered to apartments or eaten in commons areas.
    - b. Expansion of communal meal participation may be considered.

2. A Fitness Center may be used by all residents after a medical evaluation, personal orientation, and (currently) the payment of a monthly fee.
3. Housekeeping service is provided (currently limited housekeeping).

#### B. Aging in Place

1. Medication management is available for apartment residents by arrangement for a fee (currently this fee is shared by all residents, a decision of the Apartment Residents' Association).
2. Additional services in apartments are also available for a fee.
  - a. Assistance with some normal Activities of Daily Living (ADL) may be available. ADLs include bathing, grooming, dressing, eating, toileting, transferring, and ambulation. Assessment by resident services will determine the services which are needed and which can be provided.
  - b. Assistance with and assessment for Instrumental Activities of Daily Living (IADL) are available to enable residents to live independently within the community. IADLs include, but are not limited to, taking medication, housework, shopping, preparing/serving meals, laundry, transportation, and referrals for money management. The resident services coordinator may assist in arranging these services, or services may be purchased independently by the resident with notification to the resident services coordinator.
3. Assisted Living and the Health Care Unit are licensed to provide services for those residents who require a specific level of care.
4. Persons with mild cognitive impairment may be cared for in the Assisted Living facility, and persons with dementia may be cared for in the Health Care Unit.
5. Hospice care can currently be provided in the residential apartments, in the Assisted Living facility, and in the Skilled Nursing Facility by arrangement and depending on the needs of the resident.

Note: Aging in place is very important to the individuals in the community; however, individual desires may not match up with those of the community; see Section IV.

#### C. Safety

1. When called for medical assistance in emergencies, health care unit staff responds to residents.
2. All staff may respond to resident emergencies and safety concerns.
3. Safety of the individual is part of the evaluation of the level of care needed by the individual.

### III. Independence

#### A. Self-Governance

## Friends Association of Services for the Elderly – Planning Committee – Master Plan

1. The Apartment Residents' Association oversees the provision of numerous social and educational activities through its many committees, and it informs the Board of residents' concerns.
2. Clusters of residents, the basic building blocks of the community, meet regularly for discussion, discernment, and to suggest concerns for the work of the Apartment Residents' Association. The Residents' Association is distinct from, but is supported by, the professional staff.
3. Two resident representatives are members of the FASE Board of Directors following nomination by the Residents' Association and approval by College Park Quarterly Meeting of the Religious Society of Friends.
4. Residents may serve on each of the FASE governance committees.

### B. Transportation

1. Residents may own and operate their own cars.
2. Alternatives to private transportation may be developed.

C. Use of technological advances to promote independence and safety will be offered and encouraged as appropriate.

## IV. Community

- A. Each apartment resident is automatically a member of the Apartment Residents' Association and is billed a small monthly fee for the costs of the organization.
- B. The quality of life at Friends House depends on resident involvement in its life and work. All who are able to participate in the community are encouraged to do so. Residents' community involvement is a unique aspect of Friends House.
- C. The physical plant provides the setting for community, and any new construction or major remodeling needs to promote community.
- D. Friends House facilities are used by outside community groups.

## V. Aspirations

- A. Friends House should be an affordable place to live while maximizing independence, supporting community, and promoting healthy aging for its residents.
- B. Friends House should be able to assist Friends and others who have done good works but lack adequate financial resources to move in and age in place.