SURVEY TO EVALUATE INTEREST IN A RETIREMENT COMMUNITY AT UC SAN DIEGO (UCSD-RC)

You have been chosen to participate in the following market survey through your connection to UCSD. Your thoughtful response is vitally important to community planning, so we ask that you take approximately 10 minutes of your time and thoughtfully respond to this survey in its entirety. You may answer the survey for yourself, both you and a partner, or your parents; please indicate below. For purposes of this survey, this community is being called the “UCSD-RC” (UCSD Retirement Community). At the end of this survey, you will have an opportunity to opt-in to learn more about plans for UCSD-RC. If you choose to opt-in, we will maintain contact with you and keep you up to date regarding planning for UCSD-RC.

All information is for research purposes and will be kept confidential. If you are unable or unwilling to complete a question, please leave it blank and continue to complete other aspects of this survey to the best of your ability.

_____________________________________________________________________

1. For whom are you completing the survey?
   a. Myself
   b. Myself and a partner
   c. Parents

2. How attractive would it be to live in a retirement community on the UCSD campus with an emphasis on multigenerational activities?
   a. Extremely attractive
   b. Moderately attractive
   c. Slightly attractive
   d. Uninterested

3. How might you interact with the campus community were you to live in a retirement community on the UCSD campus (select as many as you wish)?
   a. Teach
   b. Take classes
   c. Attend/participate in sports activities
   d. Tutor or mentor students
   e. Participate in campus support group
   f. Attend/participate in arts events
   g. Participate in service projects
   h. Volunteer in daycare or K-12 schools nearby
   i. Participate in research on aging or other subjects
   j. Host conferences
   k. Other ______________

4. How comfortable would you be retiring in a living/learning community which included nearby housing complexes containing graduate students and their families?
   a. Very comfortable
   b. Moderately comfortable
   c. Uneasy
   d. Unappealing
A Life Plan Community, also known as a Continuing Care Retirement Community (CCRC), is a residential community for adults age 60 or above that offers an active lifestyle and a variety of housing options. Typically, a Life Plan Community offers a lifestyle that includes maintenance-free living, along with amenities such as multiple dining venues, a fitness center, and other vibrant community spaces. Life Plan Communities also provide a continuum of living services which may include Independent Living, Assisted Living, Memory Care, and sometimes Skilled Nursing Care.

5. How familiar are you with the concept of a “Life Plan Community”?
   a. Very familiar
   b. Somewhat familiar
   c. Not very familiar
   d. Not at all familiar

6. Based on the concept presented above and any prior knowledge you have, how likely are you to consider moving to a Life Plan Community in your lifetime?
   a. Very likely
   b. Somewhat likely
   c. Not very likely
   e. Not at all likely

7. Please indicate which of the choices below best fits your current plans to move to a Life Plan Community. (Please select one response only.)
   a. I plan to move for wellness opportunities and lifestyle
   b. I plan to move when I/we need help with home maintenance and upkeep
   c. I plan to move when I/we need personal assistance or health care
   d. I will not move to a retirement community under any circumstances

8. Which of the following most closely reflects the size you envision for a new residence for you in a Life Plan Community? (Please check one response only.)
   a. Less than 800 square feet
   b. 800 to 999 square feet
   c. 1,000 to 1,199 square feet
   d. 1,200 to 1,499 square feet
   e. 1,500 to 1,999 square feet
   f. 2,000 to 2,500 square feet
   g. More than 2,500 square feet

9. One of the primary advantages of a Life Plan Community is the availability of long-term care services on site. There are a number of different ways to pay for such services, most of which include one-time, up-front entrance fees along with recurring monthly service fees. Please select the long-term care payment option below that is most preferable to you:
   a. I would prefer to pay the lowest-cost entrance fee and to pay for long-term care services as I use them, at market-rate prices.
   b. I would prefer to pay a higher entrance fee (10% to 15% more) and to receive a discount on market rate prices for long-term care services.
   c. I would prefer to pay the highest entrance fee (25% to 35% more) and to have unlimited access to long-term care services without an increase in my monthly costs prior to moving
to long-term care.

10. Do you currently live in a Life Plan Community/CCRC? *If necessary, refer to the description of a Life Plan Community, which can be found above.*
   a. Yes
   b. No

11. How important would the following possible reasons to move to a Life Plan Community (like the UCSD Retirement Community (UCSD-RC)) be in influencing your decision to move to one?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Very important</th>
<th>Somewhat important</th>
<th>Not very important</th>
<th>Not at all important</th>
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<tbody>
<tr>
<td>A multigenerational campus community</td>
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<td>Active retirement lifestyle</td>
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<td>An emphasis on holistic wellbeing (mind, body, spirit)</td>
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<td>A not-for-profit community</td>
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<td>Availability of scheduled private transportation</td>
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<td>Availability of trolley or public transportation</td>
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<td>Availability of home care in your apartment</td>
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<td>Cutting-edge technology integrated on site</td>
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<td>Experienced operator/manager</td>
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<td>Lifelong learning opportunities</td>
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<td>Maintenance-free living</td>
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<td>Nutrition counseling</td>
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<td>On-site geriatric primary care</td>
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<td>On-site spiritual counseling and support staff</td>
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<td>Personal trainer and supervised fitness</td>
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<td>Plan for future health care needs</td>
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<td>Reputation of sponsor/developer</td>
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<td>Size of accommodations</td>
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<td>Social climate</td>
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<td>Value for cost</td>
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<td>Wellness program and services to stay healthy (meditation, yoga, massage, whirlpool, sauna)</td>
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<td>Walking paths</td>
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The light blue stars on the following map indicate the potential general area for the UCSD-RC on the UCSD campus.

12. As described in the survey’s introductory email, the UCSD-RC Work Group is collaborating with Kendal in exploration of a new Life Plan community where residents benefit from both the features of a traditional Life Plan community as well as the multitude of benefits UCSD provides (including location, multigenerational environment, and access to the academic, social, cultural, and wellness aspects of campus). For purposes of this survey, this community is being called the “UCSD-RC” (UCSD Retirement Community). Based on what you have learned so far about the UCSD-RC, how likely are you to consider moving to the UCSD-RC in your lifetime, if it were to be developed?
   a. Very likely
   b. Somewhat likely
   c. Not very likely
   d. Not at all likely

13. Overall, what is the likelihood you would consider moving to the UCSD-RC on the UCSD campus, as indicated on the map above?
   a. Very likely
   b. Somewhat likely
   c. Not very likely
   d. Not at all likely

Why? /Why Not? ___________________________
14. The following retirement communities are located in the greater San Diego area. With which are you familiar? (mark ALL that apply)
   a. Carlsbad by the Sea
   b. Casa de las Campanas
   c. Casa de Manana
   d. La Costa Glen
   e. Pacific Regent La Jolla
   f. The Glen at Scripps Ranch
   g. Vi La Jolla Village
   h. Wesley Palms
   i. White Sands La Jolla

15. Please indicate on the following chart which of the following features would be important to have available in the UCSD-RC and where you would like those features to be located if you were to move to the UCSD-RC.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Important for this feature to be located within the community</th>
<th>Important for this feature to be within walking distance from the community</th>
<th>Important for this feature to be available via transportation on the UCSD campus</th>
<th>Not important to me</th>
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<tbody>
<tr>
<td>Aquatic facility</td>
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<td>Area for personal gardening</td>
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<td>Art studio</td>
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<td>Bar or pub</td>
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<td>Banking service</td>
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<td>Business center</td>
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<td>Café/deli</td>
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<td>Coffee shop</td>
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<td>Day spa</td>
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<td>Educational programs</td>
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<td>Farmer’s market</td>
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<td>Fine dining</td>
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<td>Guest rooms</td>
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<td>Medical services</td>
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<td>Movie theatre</td>
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<tr>
<td>Multiple dining venues</td>
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<tr>
<td>Osher Lifelong learning</td>
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<td>Place of worship or meditation</td>
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<tr>
<td>Performance rooms</td>
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The following information will be used for classification purposes only, is voluntary, and will be kept strictly confidential.

16. Which statement below describes your most important relationship to UC San Diego?
   a. Current faculty
   b. Retired faculty
   c. Current staff
   d. Retired staff
   e. Alumni
   f. Osher
   g. Oceanids
   h. Chancellor’s Associates or other campus support group
   i. Member of a UCSD “Friends” group (i.e. Friends of the Library)

17. Which of the following categories includes your age?
   a. Younger than 60
   b. 60 to 64
   c. 65 to 69
   d. 70 to 74
   e. 75 to 79
   f. 80 or older

18. Please indicate your marital status:
   a. Married/Partnered
   b. Single
   c. Widowed
   d. Divorced/separated

19. Do you currently have long-term care insurance?
   a. I/We/My parents have long term care insurance
   b. I/We/My parents do not have long term care insurance
   c. One has long term care insurance, the other does not

20. What is your zip code? __________

21. Which of the following best approximates your total annual household income from all sources last year? Please consider income from stocks, bonds, real estate, pensions, annuities, wages and salaries, social security, or other income sources not listed.
   a. Less than $50,000
   b. $50,000 to $100,000
   c. $100,000 to $150,000
   d. $150,000 to $200,000
   e. $200,000 to $250,000
   f. $250,000 to $300,000
g. $300,000 or more

22. To the best of your ability, please estimate your net worth including the value of your home and other real estate and land holdings.
   a. Less than $250,000
   b. $250,000 to $500,000
   c. $500,000 to $750,000
   d. $750,000 to $1 million
   e. $1 million to $2 million
   f. $2 million or more

22. Would you be interested in participating in a focus group discussion for approximately two hours of your time?
   a. Yes
   b. No

If you replied “Yes” to the above question OR you are interested in staying informed regarding the progress of this new community, please provide your contact information. Again, all information is for research purposes, will be kept confidential and will not be shared.

Name_______________________________________________________________
Street address _________________________________ ______________________
City ______________________ State _________________ Zip code __________
Home phone _____________________ Cell phone ______________________
Email ____________________________

Thank you for completing this survey. We appreciate your thoughts and time!