Orange County Department on Aging

Senior Housing Report 2018

Bridging the Gap between Current and Future Senior Housing

Preparation of this report was a collaborative effort between the UNC Partnerships in Aging Program and the Orange County Department on Aging

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Partnerships in Aging Program

Orange County Department on Aging

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ORANGE COUNTY OVERVIEW

As part of the 2017-2022 Master Aging Plan, Orange County aims to ensure an array of housing options that reflects the diverse preferences and abilities of our older adult population. To accomplish this aim, the Orange County Department on Aging and UNC's Partnerships in Aging Program have collaborated to: 1) conduct an inventory of current and future senior designated housing, 2) engage in research to understand the types, prevalence, costs, and availability of housing currently available in the County and 3) survey Orange County seniors to understand their housing preferences.

In the report below, we define current senior housing trends and types, discuss the housing models that are now found in Orange County, describe senior designated housing that is under development, and conclude with an overview of what County residents say they want in their future housing. The data and information for this report were gathered from a variety of sources including: NC DHHS Aging and Adult Services County Aging Profile Reports (2016), Orange County Office of Housing and Community Development; Orange County Tax Office; Orange County Partnership to End Homelessness; town employees from Chapel Hill and Carrboro, and personal communications with developers. We intend this document to serve as a launching point for stakeholder discussions and ultimately, to guide decision-making about what housing models will best serve older adults in Orange County. The information included in the report below was collected in October and November of 2018.

DEMOGRAPHICS: SENIORS IN ORANGE COUNTY

Total population of people living in Orange County (2016) = 140,853
Total population of people 60 years old or older living in Orange County (2016) = 26,686 **Thus,19% of our County's population is 60 years old or older.**
By 2036, the population of people 60+ in Orange County is expected to increase to 44,001…exceeding the population of people between 1 and 17 years old by approximately 156%.
Twelve percent (12%) of Orange County residents living in public housing are 55+ years old. 100 out of 826 total (2018).
One hundred and eighty-eight (188) grandparents (age 60+) are living with grandchildren less than 18 years old. (2016)

INCOME AND COST

Seniors in Orange County

5.4% of people age 65+ live below 100% of the poverty level. 15.4% of people age 65+ live between 100% and 199% of the poverty level. 100% – 199% of poverty levels for one person = annual incomes between $11,770 and $23,539. (2016)
People over 65+ are the most cost-burdened age group. 28% of homeowners and 56% of renters are paying more than 30% of their income on housing.
The 5-year (2012-2016) estimated median annual household income for householders 65+ in Orange County is $52,897.

Housing in Orange County

Excluding homes in the Chapel Hill, Carrboro, Hillsborough, and Mebane town limits, the median sales price for a home in Orange County in 2018 (Jan-Sept) was $316,500, and the average sales price was $377,763. For the town limits of Chapel Hill/Carrboro, the median sales price for a home in 2018 (Jan-Sept) was $386,249, and the average sales price was $423,205. For the town limits of Hillsborough, the median sales price for home in 2018 was $279,990 and the average sales price was $320,316.

WHAT WE SAY WE WANT

A 2018 National AARP survey found that nearly 80% of 50+ adults desire to remain in their home and community as they age[1]. Further, 50% of 50+ adults say they will never move from their current home.[1] However, we will change in many ways as we live longer; emotionally, physically, spiritually, socially, and financially. Thus, planning ahead is critical to making aging in our communities and neighborhoods a reality.

Most single-family homes do not accomodate the changes related to living longer. As a result, people living in houses without universal design (lacking stepless entry, widened doorways, or accessible bathrooms) are more likely to experience the adverse health effects of social isolation and loneliness[3]. Further, mobility-restricting, unsafe environments pose challenges for caregivers and families seeking to support their older family members[4]. However, many 50+ adults are open to alternative living situations such as home sharing (32%), building an accessory dwelling unit (31%) and subscribing to services such as the Village model that enable aging in place (56%).[1]

Across Orange County, we find a continuum of senior designated housing options. These options range from senior homes and apartments for people over 55 years of age who are independent in their activities, to housing with support services (nursing homes and adult care homes) that provides personal and health services for people who need assistance with basic activities of daily living. Generally speaking, senior housing is subject to a range of regulatory oversight. Homes and apartments without services are not highly regulated unless federal subsidies and tax credits apply. Conversely, nursing homes are one of the most highly regulated industries in our country. The continuum of formal senior housing options is described below, including data about costs and availability.

CURRENTLY AVAILABLE SENIOR HOUSING

55+ INDEPENDENT LIVING COMMUNITIES

Description

55+ communities are residential areas created for older adults that want to rent or own a living space that is age-restricted. These aged-restricted communities have various housing types, such as single-family homes, duplexes, apartments and condos for rent or ownership. Living spaces in these communities are usually on one level and are smaller by today's norms (1500 to 2300 sq. ft.). 55+ communities sometimes offer recreational and social activities, but not formal health services.

Senior Apartments: We have two 55+ apartment complexes, Eno Haven and Carolina Spring. Both complexes say they accept a limited number of Section 8 Housing Choice Vouchers but practically speaking, these vouchers are rarely available.[1]

Apartment Complex	Address	Units	Voucher?	Other Info
Carolina Spring	600 W Poplar Ave, Carrboro	124	Yes	May not accept vouchers in the near future.
Eno Haven	815 US-70 BUS, Hillsborough	76	Yes	Exclusive of housing choice vouchers, Eno Haven offers 30% - 60% discounts to eligible residents, based on an income-referenced sliding scale.[2]

Cost: The rate for a one bedroom senior apartment at Carolina Spring is $986/month and a two-bedroom apartment is $1181/month. These fees do not include a $30 application fee. Housing Choice Vouchers may not be accepted if total monthly payments are less than $799 for a one bedroom apartment or $900 for two bedroom. At Eno Haven, depending on sliding scale discounts, the rent for a one-bedroom apartment ranges from $350-635/month and the rent for a two bedroom apartment ranges from $410-750/month.

Availability: Both senior apartment complexes report no vacancies as of October 2018. Eno Haven has a 37 person wait-list.

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[1] In practice, the Section 8 Housing Choice Voucher program will pay the balance of a rent payment that exceeds 30% of a renter's monthly income. The rental unit must be inspected and approved by the local housing authority and the rental amount must be at or below the Fair Market Rent set by HUD. The program is administered by the local housing authority. Each housing authority has different preferences and requirements based on their service areas' affordable housing needs. Contact Orange County Housing and Community Development (919-245-2490) for specific details about how to qualify and apply for the Section 8 Housing Choice voucher program.

[2] Discounts are made possible through a federal tax credit program available to developers.

HUD Subsidized Senior Apartments: Orange County has three venues for subsidized senior apartments.

Apartment Complex	Units	Address	Cost	Category
First Baptist and Manley Estates	41	805 S Merritt Mill Rd, Chapel Hill	Rents are 30% of one's adjusted income and take social security, pensions, and personal assets into account	HUD 202, serving 62+
Covenant Place	40	103 Culbreth Rd, Chapel Hill		
Adelaide Walters Apartments	24	603 M.L.K. Jr Blvd, Chapel Hill		

Availability: For HUD-funded senior housing, people can expect wait lists to last well over 1 year. For example, in October of 2018 Adelaide Walters had a 34-person waiting list, with only one apartment being turned over in the past year.

Senior Homes to Own

Courtyards of Homestead (2209 Homestead Road, Chapel Hill): Sixty-three (63) "active adult" independent living homes with no health services provided. Ninety percent (90%) of residents living here must be 55 years or older. The base price of these independent living homes ranges from $334,000 to $380,000. All homes have been sold as of October 2018.

Carol Woods Continuing Care Retirement Community: The continuing care retirement community model is a variation of senior-designated housing that offers units across the continuum of care from independent living to nursing home care and hospice. We have one continuing care retirement community in Orange County, Carol Woods. Carol Woods is a non-profit corporation. Across the continuum of care, Carol Woods serves people in 149 apartments, 152 cottages, 13 townhomes, 59 assisted living units and 60 nursing home units. Carol Woods also has an early acceptance program. This program provides people who live within 15 miles of Carol Woods with access to Carol Woods' services (dining, recreation, health) while they remain in their own home within the community. Once those in the early acceptance program decide they want to move into Carol Woods, and their name comes up on the Priority List with their desired floor plan, these individuals can move onto the Carol Woods campus. Admission to Carol Woods is selective, based on current health status and financial criteria. Once admitted, residents expect to live the rest of their lives at Carol Woods.

Cost: **Fees at Carol Woods are all private pay.** A studio unit for one person costs $2466/month after an entry fee of $96,600 is paid. For a two bedroom duplex cottage (with den and sunroom) with double occupancy, the monthly fee is $6,473 after an entry fee of $476,700 is paid.

Availability: Waiting times for admission to Carol Woods vary widely depending on the home size and floor plan, but wait times for a cottage can be up to 14 years.

SENIOR HOUSING WITH SUPPORT SERVICES

Adult Care Homes

Description

Adult Care Homes are a state-regulated housing option that serve people who need everyday assistance with personal care and health care. For example, someone with moderate dementia who is mobile yet needs meals prepared and prompting to maintain wake/rest cycles might live in an adult care home. Adult Care Homes typically have a mixture of planned and unplanned activities. There are two types of adult care homes that are regulated by the same State and County policies. Assisted Living facilities serve more than six people. Family Care Homes (formerly known as Rest Homes) serve 6 or fewer people.

Assisted Living Facilities: Orange County has five assisted living facilities. All of our assisted living facilities are for-profit organizations:

Facility	Address	Regular Units	Dedicated Dementia Units	Medicaid?	Corporate vs Family Owned	Other Information
Brookdale Meadowmont	100 Lanark Rd, Chapel Hill	38	8	No	Corporate	Nurses provide oversight to care. Certified Nursing Assistants and Med Tech's are the direct caregivers at Brookdale Meadowmont.
Stratford	405 Smith Level Rd, Chapel Hill	44	33	Yes	Corporate	Requirements: 55 years or older and able to stand without assistance
Carillon Assisted Living of Hillsborough	1911 Orange Grove Rd, Hillsborough	72	24 (Cannot enter on Medicaid)	Prior approval for personal care services is required	Corporate	Of note, Medicaid payment is only accepted for the Memory Care unit only if the resident spends down after entering.
Adorable Senior Living	401 W Queen St, Hillsborough	17	No Memory Unit	Yes	Family-Owned	Formerly Villines, Adorable Senior Living assumed ownership in November of 2016
Crescent Green of Carrboro	624 Jones Ferry Rd, Carrboro	120	No memory Unit	Yes	Family-Owned	Serves persons 55 and older

Cost: Monthly fees for assisted living facilities vary greatly. For example, a private room at The Stratford is $3800/month, while a private room in the dementia unit is $5000/month. Semi-private room rates are $2500/month and $4000/month in the dementia unit. In contrast, the average cost for residents of Brookdale Meadowmont in the assisted living portion ranges from $4695-6500 per month depending on the room size. Brookdale also accepts Long-Term Care and Veterans Aid and Attendance Benefits.

Availability: Assisted Living facilities generally have openings for private pay residents but openings for residents whose stays are publically funded are scarce or non-existent.

Family Care Homes represent a subset of Adult Care Homes that serves 6 or fewer older adults who need some assistance to remain independent but do not need nursing home level care. We have four Family Care Homes in Orange County.

Family Care Home	For Profit?	Address	Other Information
Yorktown Eldercare	Non-Profit (Charles House Association)	303 Yorktown Drive Chapel Hill	Need to be enrolled in day program for short period prior to entering Family Care Home.
Winmore Eldercare	Non-Profit (Charles House Association)	121 Della Street Chapel Hill	Need to be enrolled in day program for short period prior to entering Family Care Home.
LiveWell @ Birchwood Lake Estates	For Profit	6720 Pauline Dr, Chapel Hill	Specializes in Serving Persons with Dementia
LiveWell @ Coker Hills	For Profit	202 N Elliott Rd, Chapel Hill	Specializes in Serving Persons with Dementia

Cost: Monthly fees for family care homes such as Yorktown and Winmore average $6200 per month. Monthly fees for the LiveWell family care homes range from $6500-above $9000 per month.

Availability: Family care homes in Orange County are almost always full.

Nursing Homes

Description

Nursing Homes are highly regulated organizations serving two populations of older adults, 1) short term residents who need rehabilitation after a hospital stay or 2) long stay residents for whom independent living is not possible. Long stay residents must be certified by their doctor as requiring assistance with three out of five activities of daily living. (Activities of Daily Living include: eating, dressing, bathing, toileting, and transferring from one place to another.) Nursing homes currently operate under a medical model of care and are staffed by licensed professionals, including doctors, nurses, physical therapists, occupational therapists, speech therapists, dieticians, and social workers.

Nursing Homes in Orange County

Orange County has four, for-profit nursing homes that all accept Medicare and Medicaid payment (Carol Woods has a nursing home but it is not available for long stays to people unaffiliated with Carol Woods. Short-term rehab stays for non-Carol Woods residents are sometimes possible.).

Nursing Home	Family or Corporate	Medicare/ Medicaid	Units	Other information
Brookshire Nursing Center in Hillsborough	Family-Owned	Yes	80 skilled nursing units, 16 independent living apts., and 20 assisted living beds	
Pruitt-Carolina Point	Corporate	Yes	140 units, 2 adult care home units.	
Signature HealthCARE of Chapel Hill	Corporate	Yes	108 units	Full Time Pastoral Care
Parkview Health & Rehabilitation Center	Corporate	Yes	130 rehab and long term units	

Cost: Nursing home costs also vary widely, depending on whether the payer source is Medicare (short stay - rehabilitation), Medicaid (long stay) or private pay (with or without long term care insurance). Thus, it is difficult to pin point the out-of-pocket expenses for our nursing home residents. According to a 2018 survey by Genworth, the median annual cost for a private room in a North Carolina nursing home is $92,528.

Availability: Nursing homes generally have openings for residents with Medicare funding that need short term rehab. However, they may not have openings for long-stay residents with only Medicaid funding. Most nursing homes do have openings for persons who are able to pay privately. Rarely does a nursing home have 100% occupancy (except perhaps on the memory care units) because beds are kept available for persons with particular payor sources.

Home and Companion Care Agencies

Description

Since many people wish to remain in their own homes as they age, home and companion care may be needed at some point along the way. Companion care provides non-medical services such as running errands, light cleaning, or doing laundry. Home care provides all these services, plus personal care services such as bathing or medication administration. Medicaid may cover some home care services.

Home and Companion Care Agencies in Orange County

There are currently seven Home and Companion Care Agencies whose offices are located in Orange County.

Acorn Home Care Services, Inc.	Always Best Care	AmeriCare Home Care	Happy Home Care Staffing
Home Instead Senior Care-Orange	Homewatch Caregivers of the Triangle	Visiting Angels of Central North Carolina	

Cost: The services and cost of these agencies may vary depending on the client's needs and level of care required. Some home care agencies require a minimum block of hours to be scheduled (3-4 hours is a typical). Depending on the clients' situation, some agencies may work with clients to provide a fewer number of hours in the block for a higher cost. On average, home and companion care rates in Orange County vary from $18-27/per hour.

Independent Home Care Aide

The Orange County Department on Aging maintains a list of independent home care aides online and on-request through the Aging Helpline (919-968-2087). For aides to be included on this list, the Department on Aging completes a background check and obtained at least 3 positive references, including previous recipients of aide services. The cost for aide services and the duties they are willing to perform vary. However the list provides this information. Residents are encouraged to independently contact aides and set up interviews to determine the best fit between the care recipient and the home care aide.

FUTURE SENIOR HOUSING

In addition to the current senior housing options described above, there are a number of senior housing options on the horizon for Orange County. These options are listed below, along with a description of the housing type. All these projects are at different stages of development, thus variable amounts of information are available for each.

PROJECTS IN PLANNING OR DEVELOPMENT PHASES

Corbinton Commons (680 Market House Way, Hillsborough)

This community, when completed, will consist of 70 single-story, independent living homes. At least 80% of the residents will be 55+. As of October 2018, 20 of these home are are occupied, 10 are still under construction, and 15 more have been sold. All homes are expected to be completed and purchased by the end of 2019. This community does not allow children under 17. There is a one-time $900 capital contribution to the Home Owners Association. Home sale prices are between $325,000 - $460,000.

Fiori Hill – Not Senior Designated (Lorentello Circle, Hillsborough)

This development is not senior-designated however, houses are 1224 to 2200 square feet in size and all are Energy Star certified. Further, it is close to the Passmore Center in Hillsborough. There are plans for 32 homes, 17 of which are still available. Eight of the

current homes are already occupied and 7 more will be occupied by the end of 2018. Home prices range from $269,000 to $399,000. Options for accessible showers and wheelchair ramps are available for these homes.

Chapel Hill Retirement Residence (700 Block of N. Estes Drive, Chapel Hill)

This 152-suite complex is still in the planning and re-zoning phases. This housing option will consist of independent living rental apartments with additional amenities such as dining, transportation, and housekeeping. No health services will be provided. The Chapel Hill Town Council approved this project in March of 2017. The final plan was submitted in September of 2017 and the project is currently under construction.

Greenfield Commons (1719 Legion Rd., Chapel Hill)

Greenfield Commons will include sixty-nine (69) units of affordable independent housing for seniors ages 55+. No health services will be provided. This development is financed through the low-income housing tax credit program along with other financing from the Town of Chapel Hill and the NC Housing Finance Agency. Greenfield Commons is available to those who qualify based on their income. Rents will vary depending on the maximum income limit for the unit, but will range from $325-$785. Greenfield Commons is projected to be open in March 2019. Applications will be considered on a first-come first-serve basis.

Financial Eligibility for Greenfield Commons

Units	% AMI	1 Person (annual household income)	2 People (annual household income)
14	30%	$16,950	$19,400
14	50%	$28,250	$32,250
41	60%	$33,900	$38,800

Crescent Magnolia (131 Skip, Rook Rd, Hillsborough)

Habitat for Humanity has broken ground on Crescent Magnolia, a senior housing (age 55+) development located within the Waterstone neighborhood in Hillsborough. Crescent Magnolia will feature 24 single-story attached units for homeownership, a pavilion, shared green space, and walking paths. All 24 units will serve seniors living/working in Orange County that earn 30-80% of the area median income. Home features include zero-step entry, widened doorways, and accessibility modifications in the kitchen and bathroom, such as walk-in showers, grab bars, and lowered counter heights. Habitat has worked closely with the Orange County Department on Aging to receive feedback and recommendations related to home design. As of October 2018 Habitat has approved 15 homebuyers for the Crescent Magnolia development. Construction on Crescent Magnolia began in March 2018 and the estimated completion is Summer 2020.

Lloyd Farm (Intersection of NC 54 and Old Fayetteville Rd, Carrboro)

This project was approved by Carrboro's Board of Aldermen in October 2018. The project proposes 200 apartments for rent and 20 cottages for purchase for people 55+. Apartment rental cost will include dining and fitness facilities and with rents starting

between $2000 and $4000 per month. Each cottage will be two stories high and between 1600-2200 square feet. Four cottages will be designated as permanently affordable, for-sale units. Plans for the neighborhood include healthcare and grocery stores to be within walking distance of the housing development. Public Transportation will be readily accessible. The current plan is to break ground in 2020 and have full occupancy by 2022.

Habitat and Carol Woods (7516 Sunrise Road, Chapel Hill)

This is a residential co-development between Orange County Habitat for Humanity and Carol Woods Retirement Community. The project proposes 223 dwellings with a mix of housing types including duplexes, townhomes, apartments, and an assisted living facility. Neighborhood amenities proposed include a dog park, community garden, walking trails, a small café, and a community center. The development will be architecturally integrated, mixed income, and multi-generational. The project is currently in the concept plan application phase.

Homestead Rd Active Adult Housing (2217 Homestead Road, Chapel Hill)

This project proposes 190-198 rental apartment units for 55+ residents. Apartments will be configured into a 4-story building with two courtyards. Estimated rent will start at $1300 per month for single bedroom units (109) and $2000 per month for two bedroom units (81). Accessibility features will include widened doorways throughout, more elevators than is customary, and appropriate circumferences for wheelchair access in the bathrooms. Planned amenities for this development include valet garbage service, space for cooking and exercise classes, 12,000 square feet of gathering space, and a movie theatre. This project is currently in the planning phase and projected to be completed and occupied by the end of 2020.

MODELS OF SENIOR LIVING NOT IN ORANGE COUNTY

Co-Housing, Pocket Neighborhoods, Shared Housing, Themed Rental Apts. & Missing Middle Housing

Description

Co-housing intentional communities attract people who prefer to live in a self-managed, congregate setting. In conventional co-housing, 30-40 households share a common governance. There are currently 10 senior co-housing communities in the United States. Because neighbors hold a commitment to a relationship with one another, almost all cohousing communities use a form of consensus as the basis for group decision-making. Currently, we do not have any age-restricted co-housing options in Orange County.

Variations on co-housing: Co-housing is distinct from a regular neighborhood by having some degree of "intention" that is evident among the people who choose to live there. A **Pocket Neighborhood** focused on seniors might be considered a smaller version of co-housing with 8-12 homes configured around a central courtyard. Typically, a pocket neighborhood contains a common house where guestrooms, exercise facilities, a kitchen, or tool shed might be found. **Shared housing** is another co-housing option. Here,

unrelated people choose to live together in one house, establishing norms and policies that guide aspects of living such as meal preparation, caregiving, and shared possessions.

Rental housing with an arts focus is a model that we learned about in our Aging in Community Speaker Series. This model brings seniors together in rental housing around a common interest such as art, music, theater or dancing. Inherent within this model is the concept that seniors offer their talents to each other and to the community through galleries, music "jams", performances, and participatory events. Currently, Orange County does not have any senior-designated co-housing, pocket neighborhoods, or themed rental housing. Shared housing is restricted in Orange County by ordinances that preclude more than 5 unrelated people from living in the same house. In Carrboro and Hillsborough, 5 unrelated people are permitted to live as a "family" in single-family dwellings. In Chapel Hill, 4 unrelated people are permitted to share a single-family home.

Missing Middle Housing is a range of multi-unit or clustered housing types compatible in scale with single-family homes that help meet the growing demand for walkable urban living. Missing middle housing includes housing types that we have lost sight of but that are rapidly returning to urban landscapes nationally. Bungalows with courtyards, duplexes, quadriplexes, and housing above retail are all examples of missing middle housing.

Orange County Department on Aging

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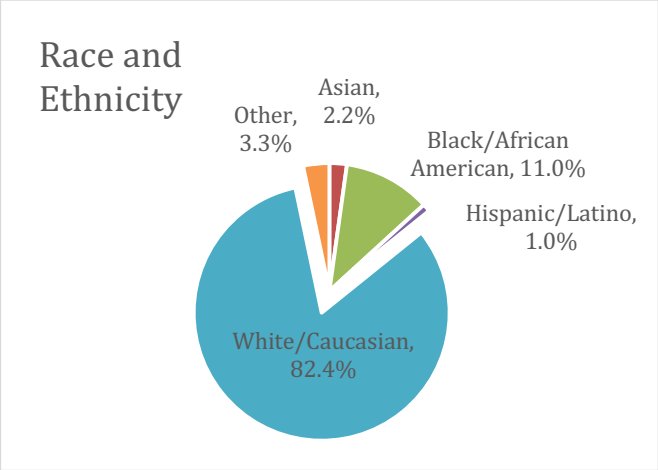
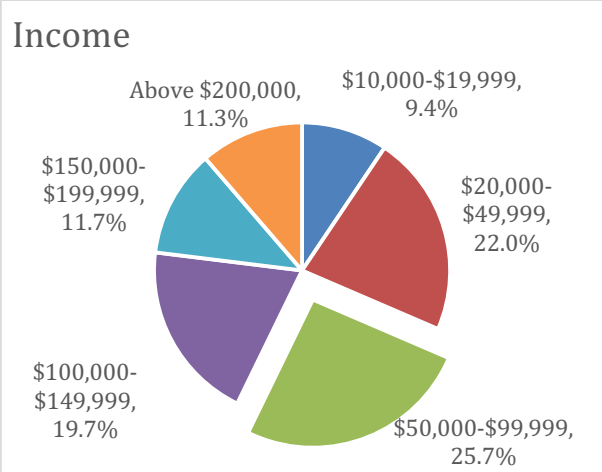
ORANGE COUNTY FUTURE SENIOR HOUSING SURVEY

In May 2014 and again in November 2016, the Department on Aging surveyed 593 volunteer participants age 50+ about their preferences for future housing. Survey results are shown below.

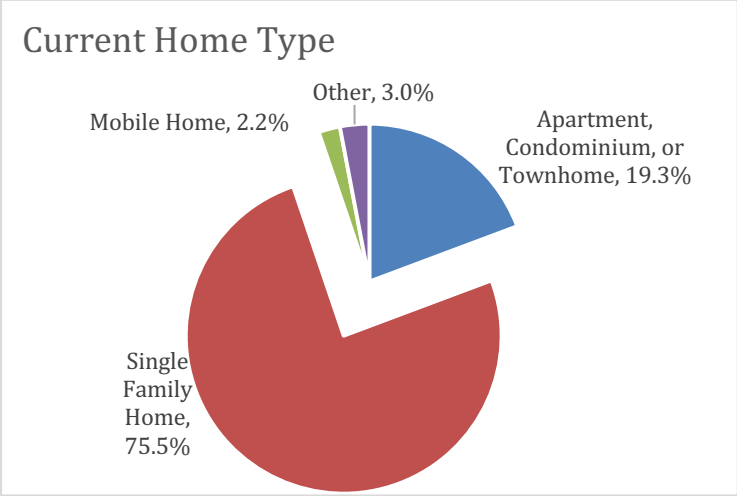
Demographics of Survey Participants

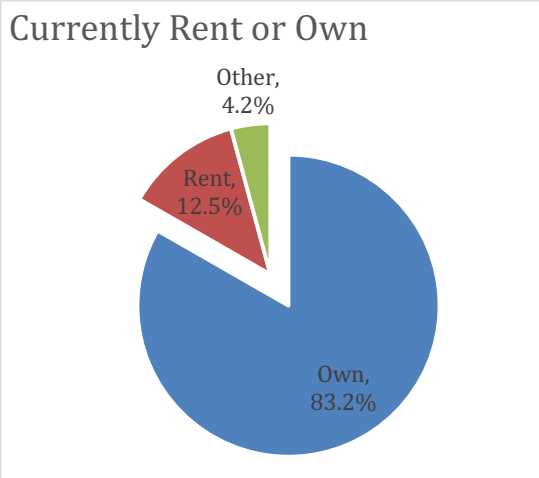
Average age: 67.2 years old

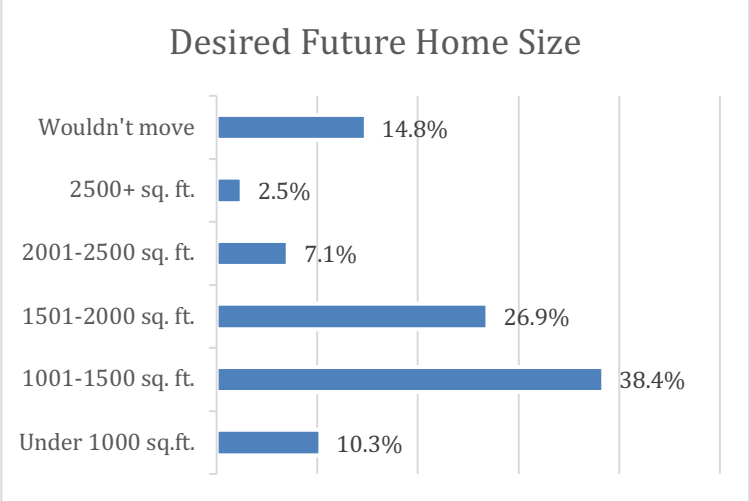


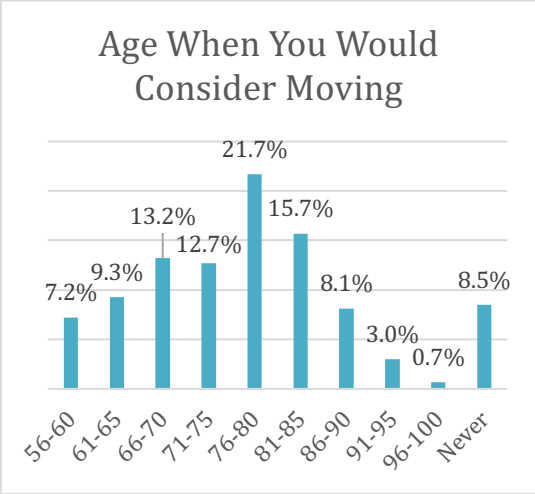


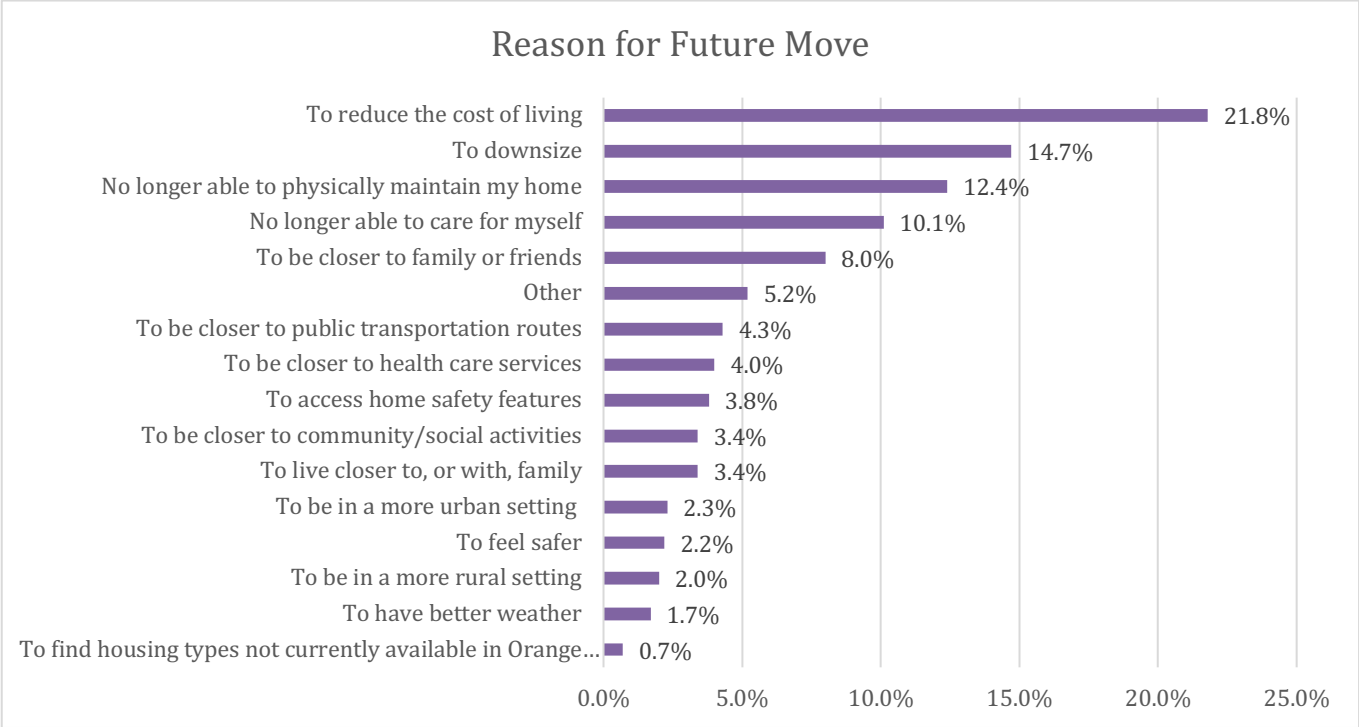
Current and Desired Future Housing

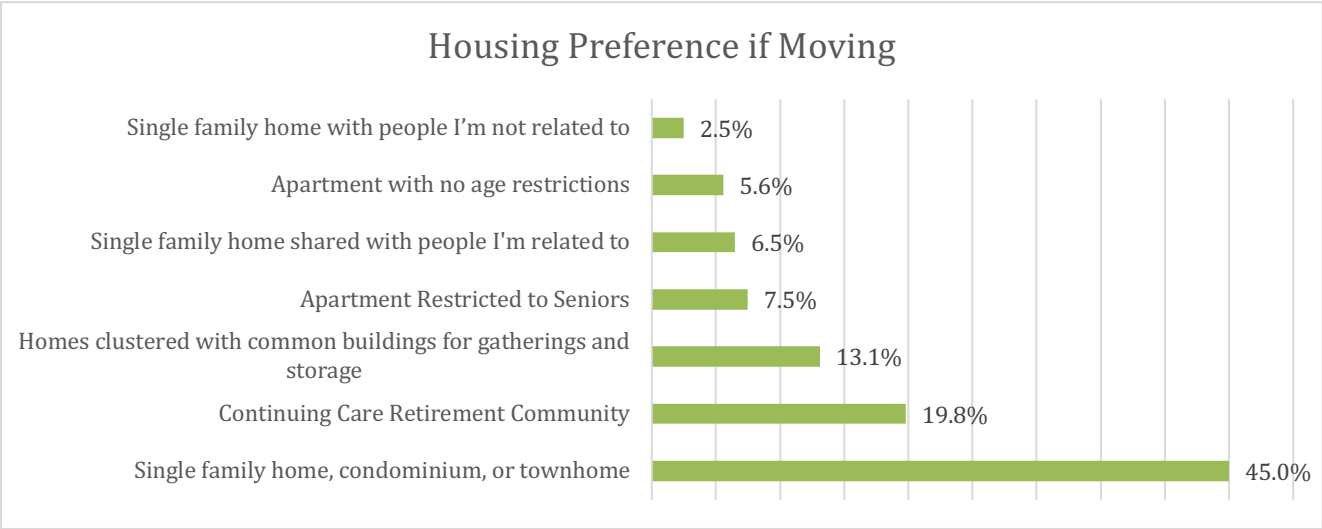












Discussions and Focus Groups

To expand the survey results above, we gathered information from 93 people who participated in Aging in Community post-presentation discussions and 29 County residents who met for a 4 hour "deep dive" into their future housing. The comments outlining participants housing preferences grouped naturally into four categories; 1) Housing Design, 2) Landscape Design, 3) Social and Care Features, and 4) Community Features. Under each category below, we have ordered the features of importance from high to low based on how frequently they were cited.

Housing Design	Landscape Design
1. One level on ground - no steps 2. Accessible with universal design features 3. Energy efficient (solar) 4. Low maintenance	1. Natural beauty that includes trees, plants, flowers, parks, courtyards, gardens, hiking and biking trails 2. Walkability/paths
Social and Care Features	**Community Features**
1. Sharing learning opportunities for creative endeavors such as music, art, crafts, dancing, games, entertainment, support groups (also, participation in religious and cultural activities) 2. Multi-generational 3. People that know and care about me 4. Proximity to health, housekeeping, maintenance, and transportation services 5. Multi-cultural 6. Opportunities to provide help: care teams, volunteer corps	1. Private areas for quiet - meditation 2. Common areas with space to gather, prepare, and share food 3. Public transportation 4. Exercise facilities

Survey Summary

From the results shown above we see that people want to live in single story structures that include universal design features, are energy efficient, and require little maintenance. Living in a natural environment that promotes social engagement and physical activity is preferred. Opportunities to be involved with members of all generations are important. Finally, people seem to prefer to live in a community that offers common spaces for gathering, quiet areas for contemplation, and access to public transportation.

CONCLUSION

This report serves as a call to action for our community, the Aging Board, and County government. We ask, “What kind of senior housing should Orange County invest in or encourage development of? More of the same? Promote something different? Orange County does not have enough dedicated housing to accommodate our current population of seniors, particularly those with middle incomes. Effective partnerships between Orange County Departments of Planning, Housing, and Transportation offer rich opportunities for innovation. Through public-private collaborations we can support our resident entrepreneurs, taxpayers, health service providers, developers, architects and builders in achieving the best possible housing outcomes for Orange County seniors.

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