Aging-in-Place Principles in Action

A LIVE ONLINE EVENT

June 17, 2016
Agenda

• Welcome + Context Setting
• Toolkit Introduction
• Deep Dive: Aging in Place Principles
• Charrette Example
• Q+A
Objectives

Attendees of this Live Online Event will be able to:

• Identify Aging-in-Place strategies for new construction and retrofit projects

• Explore available tools, recognizing which to use to better respond to the varied needs of aging residents through building design and retrofit decisions

• Prioritize building design and retrofit decisions by weighing project priorities with potential impact of Aging-in-Place measures and cost
“We believe, because it is true, that people are affected by their environment, by space and scale, by color and texture, by nature and beauty, that they can be uplifted, made to feel important.”

Jim Rouse | Founder
Enterprise Green Communities is transforming the way America thinks about, designs, builds, and rehabilitates affordable housing.

Green building integrates materials and methods that promote environmental quality, economic vitality, and social benefits through design, construction and operations of the built environment.

Enterprise Green Communities aligns affordable housing investment strategies with environmentally responsive building practices.
2015 Enterprise Green Communities Criteria

A holistic approach to building a green community

Integrative Design

Location + Neighborhood Fabric

Site Improvements

Water Conservation

Energy Efficiency

Materials

Healthy Living Environment

Operations, Maintenance + Resident Engagement
Tools & Services

www.enterprisecommunity.org/Green
With offices in Denver, Boulder and Colorado Springs, OZ Architecture has been creating innovative, collaborative, and timeless architecture around the world since 1964. With projects in nearly every continent, we are known for designing globally-recognized, award-winning buildings that offer the best solutions for our clients and make a lasting contribution to the communities they’re in. Our work reflects our passion and is an iterative process, ultimately leading to timeless solutions that mature gracefully.

Jami Mohlenkamp
Principal

Rob Rydel
Principal

Julie Edwards
Director of Sustainability
Tool Kit Introduction
The CDC defines **Aging-in-Place** as "the ability to live in one's own home and community safely, independently, and comfortably, regardless of age, income, or ability level."
Charrette Tools
### Charrette Tools

#### Group 4: Aging in Place

**Addressing Physical Limitations**

<table>
<thead>
<tr>
<th>TARGETED PROJECT GOAL</th>
<th>DESIGN/IMPLEMENTATION STRATEGIES</th>
<th>IMPLEMENTATION CONSIDERATIONS</th>
<th>CHALLENGES / FEASIBILITY</th>
<th>TRADE-OFFS AND STRATEGIES</th>
<th>LINK TO TOUCHSTONE</th>
<th>NEXT STEP</th>
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**Aging-in-Place — Addressing Physical Limitations**

**Aging-in-Place Addressing Visual Impairment**

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**Group 4: Aging in Place**

**Addressing Diminished Mental Capacity**

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<tr>
<th>TARGETED PROJECT GOAL</th>
<th>DESIGN/IMPLEMENTATION STRATEGIES</th>
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Charrette Tools

1. Recommendations (2015 Criteria context)
2. Aging in Place Principles
3. Existing Conditions Checklist
4. Prioritization Tool
## Charrette Tools - Recommendations

### Aging-in-Place Recommendations

**2015 Enterprise Green Communities Criteria**

#### Mandatory Measures & Optional Criteria

<table>
<thead>
<tr>
<th>M/D Points</th>
<th>NC</th>
<th>SR</th>
<th>MB</th>
<th>Title / Description</th>
<th>Identified Criteria Recommendations for Aging In Place Projects</th>
<th>Guideline References for Additional Information</th>
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<tr>
<td>2. Integrative Design</td>
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<tr>
<td>2.1a</td>
<td>M</td>
<td>X</td>
<td>X</td>
<td>Goal Setting</td>
<td>Develop an integrative design process that works best for your project team and intentions. At minimum, document: 1. A statement of the overall green development goals of the project and the expected intended outcomes from addressing those goals. 2. A summary of the integrative process that was used to select the green building strategies, systems and materials that will be incorporated into the project. 3. A description of how progress and success against these goals will be measured throughout the completion of design, construction and operation to ensure that the green features are included and correctly installed.</td>
<td>Aging-in-Place projects can present specific and unique challenges for teams and early discussion for these project types is especially important. Set goals for the level of Aging-in-Place implementation at the beginning of the project and include discussion during the charrette. Using the Aging-in-Place charrette tools will help the team identify goals and intended outcomes early in the design process. Additionally, review the recommendations for existing Green Communities Criteria below, the Aging-in-Place Guidelines and Universal Design Specifications. A key issue to consider during the programming phase is the addition of extra space, exceeding minimum requirements whenever possible. Exceeding code-required minimum clearances will provide aging residents with the needed room for themselves and potential aids; also making the space more maneuverable for residents in wheelchairs, or who may be overweight in addition to other limitations.</td>
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<td>2.1b</td>
<td>M</td>
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<td></td>
<td>Criteria Documentation</td>
<td>Create design and construction documentation to include information on implementation of appropriate Enterprise Green Communities Criteria.</td>
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<td>2.1c</td>
<td>S</td>
<td></td>
<td></td>
<td>Designing for Project Performance</td>
<td>Identify how the expected performance of your project compares to the actual performance of other projects in your portfolio and/or community.</td>
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</table>
Charrette Tools - Recommendations

Active Design: Staircases and Building Circulation

A staircase must be accessible and visible from the main lobby as well as visible within a 25-foot walking distance from any edge of lobby. Ensure that no turns or obstacles prevent visibility of or accessibility to the qualifying staircase from the lobby, and that the staircase is encountered before or at the same time as the elevators.

From the corridor, accessible staircases should be made visible by providing transparent glazing of at least 10 square feet (1 square meter) at all stair doors or at side light OR providing magnetic door holds on all doors leading to the stairs or removing door enclosures.

Charrette Tools - Recommendations

Charrette Tools - Recommendations

Charrette Tools - Recommendations
### Access to Public Transportation

Locate projects within a 0.5-mile walk distance of transit services combined (bus, rail and/or ferry), constituting at least 60 or more transit rides per weekday, with some type of weekend ride option.  
[8 points]

For projects that qualify as Rural / Tribal / Small Town, locate the project within a 5-mile distance of at least one of the following transit options: 1) vehicle share program; 2) dial-a-ride program; 3) employer vanpool; 4) park-and-ride; or 5) public–private regional transportation.  
[8 points]

For an additional 2 points: Locate the project along dedicated bike trails or lanes that lead to transit services or stations (bus, rail and ferry) within 3 miles.

Public transportation provides affordable, reliable, predictable transportation for aging residents, who are less likely to drive or walk longer distances due to physical or mental limitations. Residents with limited mobility may have difficulty reaching transit stations or bus stops located up to 0.5-miles away. Locate the project within 0.25-mile walk distance of transit services with safe and accessible walking routes.

Many bus routes are designed for commuters which travel in early morning and in the evening. However, aging residents who may be retired, typically travel more during the day. If the resident population is large enough you may be able to request that additional times or a bus stop be added to the site.

Wayfinding signage to nearest stops and posting physical public transportation schedules will also be beneficial for aging residents who may not be technology savvy or own a computer.
AGING-IN-PLACE EXISTING CONDITIONS CHECKLIST

This checklist may be used to evaluate an existing site and/or building for exterior and interior components that would enable residents to age in their homes and communities. Checklists are intended to be used on a building/site walk through to log observable conditions. Teams are encouraged to add additional project specific items. See the unit tab for more information.

Property Address: ________________________________

SURROUNDING COMMUNITY

<table>
<thead>
<tr>
<th>Building is located in a pedestrian-friendly community with accessible sidewalks, curb cuts, crosswalks and nearby services. Residents can easily navigate between home, transit, parking and local services.</th>
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<tr>
<td>Public transportation is available within a short walking distance.</td>
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<th>fully met</th>
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**AGING-IN-PLACE EXISTING CONDITIONS CHECKLIST**

This checklist may be used to evaluate existing residential unit components that would enable residents to age in place. Checklists are intended to be filled in for each unit type and used on unit walk throughs to log observable conditions. Teams are encouraged to add additional project specific items. See the site/building tab for additional components.

Property Address: __________________________

Unit Type: ___________________________ Number of Units: ___________________________

Percentage of Units that comply with below criteria: ___________________________

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<th>not met</th>
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**UNITS - GENERAL**

Entry door sidelight or high/low peep hole viewer is provided; sidelight should provide both privacy and security. Resident has audible and visual notification of visitors—light activated and/or audible doorbell or intercom.
Charrette Tools – Prioritization Matrix

The prioritization exercise is intended to help teams organize aging-in-place strategies in a way that will assist the team in recognizing the relative priority levels between strategies. Discussion around how vital the strategy, cost, and phasing will help the team and the strategy within the chart. See directions and example below for guidelines on evaluating.

Participants in the prioritization exercise are free to use the chart's printable version of the chart.

**Aging-in-Place Prioritization Charrette Tool**

**Prioritization Matrix**

1. **Before printing/reprinting the prioritization chart,** discuss the recommended categories along the left side and decide if they should be reworded for your project, or if any should be replaced with alternate categories that better fit your project goals.
2. **Print the prioritization chart at a large scale (48x36 inch or larger recommended).** Each box will need enough room for multiple large sticky notes.
3. **Gather supplies for the colors of sticky notes** (2x2 or 3x3 inch) in red, yellow, and green, pens or markers, prioritization chart, pad of paper, and a pen or pen and paper. This chart of priorities, each participant will have a sheet of sticky notes.
4. **Prepare the team by hanging the prioritization chart on the wall (or layout on a large table) and distributing pens and sticky notes to participants.**

**PARTS – INDIVIDUAL INPUT (DRAWING)**

1. **Before the exercise begins,** explain to the participants that they will be brainstorming Aging-in-Place strategies and writing them on sticky notes. Direct them to put high-cost strategies on red sticky notes, medium-cost on yellow sticky notes, and low-cost on green sticky notes. Explain the goal of the exercise will be to help the team prioritize these strategies, and that when they are finished, they will be asked to place the sticky notes on the chart in the colored boxes they feel is the best choice.
2. **At the beginning of the exercise, divide the participants into four groups:**

**PARTS – GROUP DISCUSSION & PRIORITIZATION**

1. **Discuss the strategies as a group and decide whether each strategy is in the appropriate category and priority level (cost) based on the discussion.** Discuss strategies between teams, trade-offs, and phasing in phase (cost: this strategy may be included in initial construction or can be added later). Have the team think about the strategies for each strategy on the chart. How are they prioritized on the chart?
2. **Once the team is satisfied that strategies are in the best suited category on the chart, explain that the next step is to begin to evaluate the strategies relative to one another (cost will be added to the discussion). Do not move the sticky notes during this next part of the discussion as the color of the priority level will inform the priority level. The goal will be to create a list of strategies from the highest priority to the lowest.**
3. **Create your list of strategies on the large scale paper. Ask group members to be the note-taker and start the number 1 on the paper as the highest priority.** You will be using the colors on the chart as a guide to help the team prioritize the strategies. Begin the discussion of the top priority strategy by focusing the attention of the group to the largest green box at the top left of the list. Work your way down in order and move the notes in order of evaluation on the list.
This is an optional scoring exercise (the team is having a tough time evaluating strategies against each other). The score may or may not reflect the true value to the project. This method should only be used as a tool to help compare relative value of strategies. Score each strategy and list them out in order of numerical value from highest to lowest.

**Charrette Tools – Prioritization Matrix**

**AGING-IN-PLACE PRIORITIZATION CHARRETTTE TOOL**

- Column boxes are assigned a value, with the highest value assigned to the most imperative, highest priority item.
- Values are assigned to reflect that a medium priority item is assigned to a higher priority item in a less imperative category.
- Cost is also assigned a value, with the least cost items having the highest value.
- Green sticky = 5
- Yellow sticky = 2
- Red stick = 1

To score the strategy add the two values together. Score = value of colored box + value of colored stickies. (For this example 4 + 3 = 7)

**Categories:**
- Life Safety
- Security
- Accessibility
- Usability
- Convenience
Charrette Tools

1. Recommendations (2015 Criteria context)

2. Aging in Place Principles

3. Existing Conditions Checklist

4. Prioritization Tool
Strategies
Site – Accessible Location
Site – Outdoor Spaces
Site – Community Garden
Building Lobby Features
Circulation
Corridors & Wayfinding
Building Common Spaces
Unit - Layout
Unit - Finishes
Unit - Kitchen Cabinetry
Unit - Bathroom

- Modern bathroom design with a sink, mirror, and green tiled floor.
- Storage unit with toiletries and a light fixture.
- Nightlight toilet advertisement.
- Wheelchair-accessible bathtub with grab bars.
- Foot image with textured floor tile.
Unit- Bedroom
- West Hollywood CHC
- Van Meter Williams Pollack
- PSL Architects
- Stakeholders
- Enterprise, Southern California

AGING-IN-PLACE PRIORITIZATION CHARRETTE TOOL

Colored boxes are assigned a value, with the highest value assigned to the most imperative, highest priority item.

Values are assigned to reflect that a medium priority item in a more imperative category might be equal to a higher priority item in a less imperative category.

Cost is also assigned a value, with the least cost items having the highest value. Green sticky = 3
Yellow sticky = 2
Red sticky = 1

To score the strategy add the two values together. Score = value of colored box + value of colored sticky note. (For this example 4+2=6)
Los Angeles Charrette
THANK YOU

certification@enterprisecommunity.org
Have Fun for Years to Come!