

AN ABSTRACT OF THE THESIS OF

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Date thesis is presented 8-12-66

Title THE SPATIAL LINKAGES OF RETIREMENT CENTERS IN

OREGON

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Abstract approved \_\_\_\_\_  
(Major professor)

The retirement center is the new pattern of settlement in Oregon. A few years ago there were no modern living accommodations in the state especially designed for people in the retired category. As to July 1966 development organizations have thirteen centers in operation and over 4, 000 people are in residence.

Retirement centers are not "old folks homes"! They are modern apartment dwellings or individual homes grouped into a community, where senior citizens may acquire living quarters for the balance of their lives. By choice they live in a social environment that is compatible to their age group. In many cases financial problems associated with future living and possible hospitalization and medical care are minimized.

Group living for senior citizens is the fundamental philosophy of all retirement centers, however, differences exist that make possible two broad divisions. The groupings are the life care and

the non-life care centers. The former furnishes the residents with complete care for the balance of his life; the latter is similar but does not guarantee complete medical or nursing care.

The majority of the centers in Oregon have been concentrated in the western portion of the state. Eleven of the thirteen centers are in the Willamette Valley and the other two are in southwest Oregon.

A number of factors influenced the location of centers at sites in western Oregon. Perhaps the most significant factor was the preponderance of population in this portion of the state which provided potential residents. Furthermore, associated with areas of high population densities were adjuncts vital to center location which would include medical and hospitalization care, transportation, shopping, recreation, and cultural advantages.

Proximity to a shopping center played a part in the location and medical aid, hospitals, nursing and convalescent care were vital considerations in site selections. Nursing homes and infirmaries are a part of the physical make-up to most centers, however, few have hospitals.

Easy access to principal arteries of transportation was a site factor and availability of vicinal transport services was even more significant. In all cases no center was isolated from main highways nor lacking in public or private transportation facilities.

Use of leisure time is a serious problem for the senior citizen and it is a responsibility of center administrators to provide stimulating and satisfying leisure time outlets. A location with access to recreation facilities was significant as well as space and the nature of the space on the site for outdoor recreation possibilities.

The potential for more retirement centers in Oregon is great particularly in the Willamette Valley. In the next 14 years, that is by 1980, it is projected that Oregon's total population will increase to 2,373,085 people. Of this number, 271,903 people would be 65 years of age or older. Sixty eight percent of this age group or approximately 186,000 people would be residing in the nine Willamette Valley counties.

Presently the Oregon retirement centers have about 6,732 units and approximately 4,322 residents or 2.2 percent of Oregon's population of 65 years of age and older. If the percent of resident occupancy remains constant there would be over 7,000 residents by 1980. It is felt that numbers will increase and the percent of residents will escalate from 2.2 percent to about 5 percent or 11,500 individuals by 1980.

The success of retirement centers in Oregon is assured and the need is corroborated by the fact that four new centers are scheduled to open in the near future.

Retirement centers are an integral part of the landscape mosaic of Oregon and make a notable contribution to the state's settlement pattern.

THE SPATIAL LINKAGES OF RETIREMENT  
CENTERS IN OREGON

by

CONRAD LEE HEINTZELMAN

A THESIS

submitted to

OREGON STATE UNIVERSITY

in partial fulfillment of  
the requirements for the  
degree of

MASTER OF SCIENCE

June 1967

APPROVED:

Redacted for Privacy

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Date thesis is presented August 12, 1966

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# THE SPATIAL LINKAGES OF RETIREMENT CENTERS IN OREGON

## I. INTRODUCTION

During the past eleven years a new spatial system in residential living for "senior citizens" has been developing in Oregon. Retired individuals are grouping together, forming their own communities; some within urban areas, others in rural environments. The majority of these communities or retirement centers are sponsored by churches and conceived to provide living accommodations with pleasant surroundings for elderly members of their congregation and other individuals with similar interests.

In the mid-20th century men and women in their middle sixties and over are no longer cataloged as "old folks". The senior citizen is the current nomenclature. The renovation of antiquated late 19th century dwellings into nursing and retirement homes for elderly people is passé and the "Old Folks Home" is becoming an anachronism. No longer do elderly men and women vegetate in environments that connote the inevitable. Today they may reside among pleasant and comfortable environments where there can be a recreation of spirit and body and opportunities to live rich and active lives among people of their own age group with similar interests.

To meet the needs of today's elderly and retired population

modern retirement centers have been constructed. Some of the centers are highrise apartment dwellings, others are limited to one or two stories, and in some cases they consist of individual homes grouped into communities. Regardless of their physical structures they all have the basic objective of providing satisfactory housing for people no longer concerned with individual or family homes. Residents elect to reside in the centers with complete freedom of movement, and the opportunity for choice in the activities of their senior years.

The first retirement center in Oregon was the 243 room Willamette View Manor erected in Portland in 1955. The popularity and demand stimulated the enlargement of the center to 370 units within a few years. Following patterns developed by Willamette View Manor other retirement centers soon developed and in 1966 there are thirteen centers totalling over 3,000 units occupied by retired individuals in Oregon. Nine cities in Oregon have centers; others have centers in the building stage or plans are on the drafting tables.

### Purpose

The purpose of the thesis is to analyze the spatial systems of the retirement centers in Oregon, to study the reason for their locations, and to evaluate the physical requirements for the new living

pattern in Oregon.

A personal interest was involved as part of the crux in the development of the thesis. Are retirement centers merely nursing homes in disguise? What is the reason for a highrise retirement center in the rural community of Canyonville? Why are retired individuals moving to Woodburn? What is life care? Is there a correlation between population statistics and retirement center potentials? These and other pertinent questions prompted the research.

It is a sincere hope that the study may be of some value in future planning as retirement centers in Oregon increase, particularly in regard to site and situation, and especially concerning service and amenity requirements.

### Research Procedures

Research was instigated from December 1965 through July 1966. An extensive reading program was oriented to the "problems" of the senior citizen segment of the population. Readings concerned not only the reasons for retirement centers and their locations but also the problems and needs of the senior citizen. Little has been published about retirement centers in Oregon with the exception of advertising brochures distributed by the several organizations.

Every retirement center in Oregon was visited several times.

Each was examined and analyzed as to its site and situation including its location in relation to the physical environment, the proximity to shopping and service accommodations, and recreational activities. Maps were drawn of the area, in which each center was located to assist in the analysis and evaluation especially of spatial linkages.

Interviews were obtained with the administrator or his representative at each center. A prepared questionnaire was the basis of each interview. (See Appendix I) In addition to the questionnaire other questions were asked pertaining to the particular location of the center. Residents at each location were interviewed concerning their selection and their activities, in comparison with their life prior to retirement.

The Oregon State Welfare agency in Salem provided information and ideas as to problems to be considered when studying senior citizen centers. The Department of Health, Education and Welfare, Social Security Administration in Salem and Baltimore, Maryland provided statistical information on individuals over 65 years of age.

A comprehensive study of each retirement center found in Oregon was not considered feasible and would involve considerable repetitious material, hence a value judgement selection of representative examples was made. Three centers were chosen as representative of the retirement developments found in Oregon and were studied in detail. These include (1) Friendsview Manor, Newberg,

a life care center, with church sponsorship, catering primarily to the lower middle class income bracket, (2) Woodburn Senior Estates, Woodburn, a non-life care center, organized by a land developing company providing middle class income housing, and (3) Capital Manor, Salem, a life care center, under non-denominational sponsorship composed mainly of residents with middle to upper class incomes.

### Thesis Organization

Chapter I constitutes the introduction to the thesis. Chapter II is concerned with population dynamics and explores the population element with special emphasis on the spatial distribution of retired and potential retired in the state. Types and spatial linkages of retirement centers are described in Chapter III. Chapter IV is a case study of the three type centers. Chapter V, the conclusion, is a synthesis of the findings and effects of retirement centers on the particular communities concerned and the state of Oregon.

## II. POPULATION DYNAMICS

A significant consideration in the study of Oregon retirement centers is an analysis of state population statistics which reveal numbers and age groups. The age threshold of 65 has long been considered as the terminal point for man's formal "usefulness" to an economic society. The continuation of employment, however, may hinge on the nature of the occupation. White collar workers often remain on the job until 70 and more. This is partially true with positions in the academic profession. In cases of self-employment the owner commonly continues his activity until physical disability and/or desire brings an end to his labors. Thus it is difficult to arbitrarily assign a particular age as the threshold level for starting retirement. The fact is that individual circumstances as well as the kind of occupation are factors. This, however, is not the policy of most types of business concerns but rather 65 has become the accepted starting point for retirement.

Life expectancy tables, the bases used by insurance companies for the setting of policy rates, is another important facet in retirement center analysis. Life expectancy tables are of necessity subject to periodic revision. It is a well-known fact that the normal average life span of man has been increasing with each passing decade as a result of such factors as control of disease, better medical

care, diet, and labor-saving devices in factory, farm, and home.

The value of life expectancy tables may be expressed in terms of the number of years a retirement center may expect occupancy.

Income analysis also is a useful adjunct in estimating potential residents for retirement center entrance, and finally evaluation of the spatial pattern by counties in Oregon may be used as a basis for predicting retirement center need and development.

### Oregon Population Statistics

The estimated population of the state of Oregon in 1965 was 1,893,696. In the analysis by age groups in this estimated population only those in the 50 year and above class will be considered since it is this group that are to be thought of as potentials for community and retirement center occupancy. There were 488,000\* people in age groups from 50 and upward which represents a little over 25 percent of the total population and 200,000 in the 65 and over group (14). There were 206,000 in the 50 to 59 class, 147,000 from 60 to 69, 99,000 from 70 to 79, and 35,000 in the 80 to 85+ category (Figure 1).

At present (July 1966) there are 6,732 available spaces in the thirteen retirement centers of Oregon with 4,322 occupants. Thus,

\*To simplify interpretation most census figures will be rounded off to the closest thousand. Correct figures are included in the graphs.



Figure 1. Number of individuals by age groups in Oregon (14)  
1965

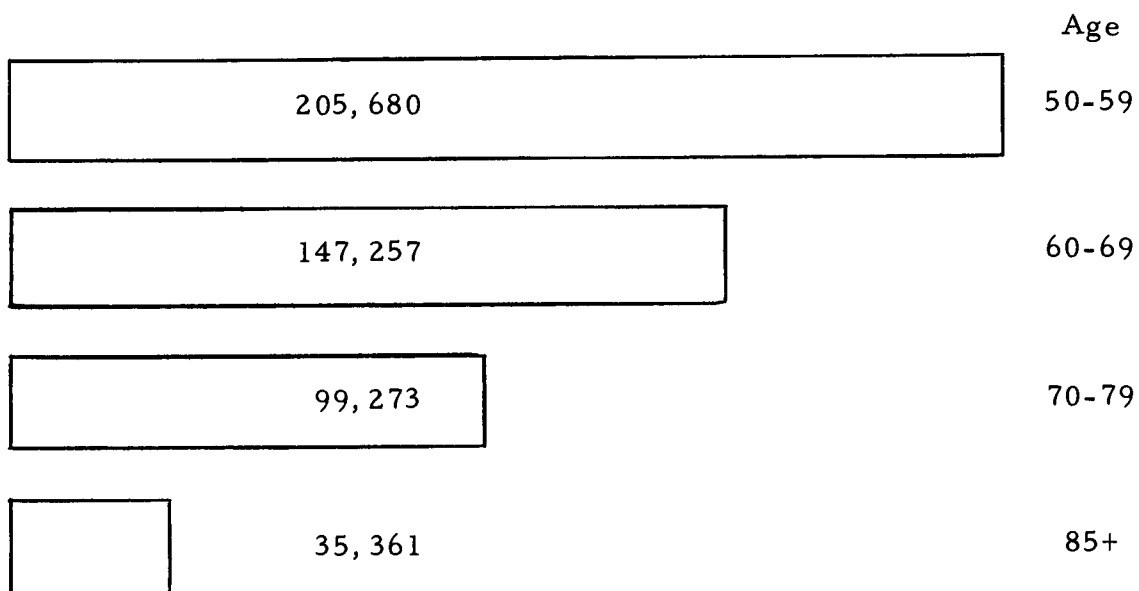
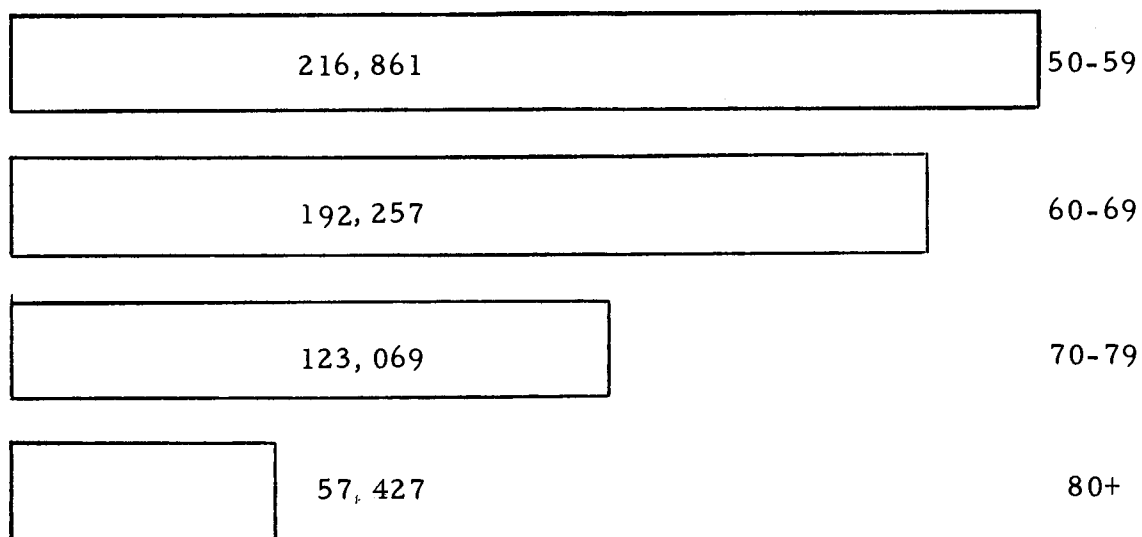


Figure 2. Number of individuals by age groups in Oregon (14)  
1980



the percent of retirement occupance in Oregon is 0.23 percent for the entire population, 0.88 percent for all those above 50 years of age and more and only 2.2 percent of the 200,000 people above the age of 65--the stated retirement age.

The projected population for the state in 1980 gives 2,373,000 people residing in Oregon with a little under 25 percent above the age of 50 (Figure 2). The specific breakdown of this projected population figure shows 217,000 between the ages of 50 and 59, 192,000 between 60 and 69, 123,000 in the 70 to 79 class and the 80+ group contains 57,000.

The 65 to older group then would be 272,000 people. Using the 1965 percent (2.2%) of 65 and older occupancy, the estimate of retired occupancy in 1980 would approximate 7,000 residents. This is strictly a raw figure and does not indicate human factors that could influence retirement center entrance. It does suggest, however, the probable need for more space and more centers.

### Life Expectancy

A retirement center has a physical point of occupancy saturation. There is, however, a turnover founded on the inevitable exigencies of old age. It is beyond the power of man to predict precisely the length of the life span, however, statistical information derived from numerous years of research provides a working basis

for length of life determination. The average life expectancy for people at age 50 is 23.6 years and at 60 it is 16.1 without taking into consideration that in general females live longer lives than males. Decreasing in length with the addition of years those in the 65 bracket have a projected life period of 12.9 years. Those at 70 have 10.12 years remaining and at 75 the expectancy is 7.81. People beyond this age bracket have a relatively shorter life span left to them since the 80 to 90 class expectancy is about 4.5 years (Table 1) (13).

Turnover in retirement homes is computed on an individual basis but even this is no definite assurance, only a probability. The value of information derived from a mortality table to a retirement center may be questionable but at least it furnishes an arithmetical formula as to possible changes in occupance patterns. One Oregon center makes use of an expectancy chart to determine part of the initial entrance fee.

Table 1. Life Expectancy

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Age	Life Expectancy
50 . . . . .	23.63 years
55 . . . . .	19.71
60 . . . . .	16.12
65 . . . . .	12.90
70 . . . . .	10.12
75 . . . . .	7.81
80 . . . . .	5.85
85 . . . . .	4.32
90 . . . . .	3.00

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Commissioners 1958 Standard Ordinary Mortality Table  
#4401 Edition 1964

#### Population Analysis by Income Levels

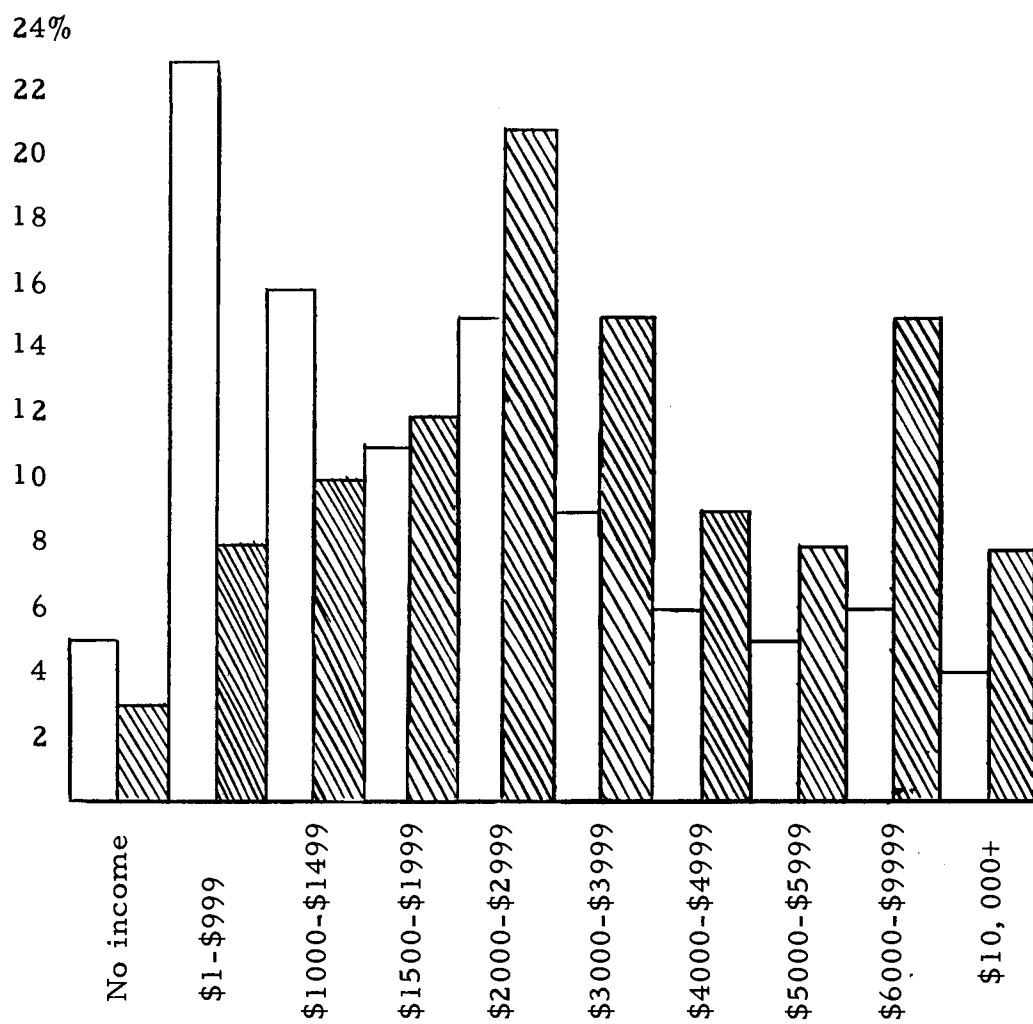
Retirement centers do not come under a charity classification. Present day centers are modern, expensive structures with relatively complex organizations geared to comfortably house and properly cater to hundreds of people. Facilities for recreation and plans for satisfying use of leisure time are significant facets of the center. In many cases professional medical and convalescent care are made available. Capital investments in buildings and grounds are high and

the staffing of centers is a continuous and heavy expense. For example the capital investment in a Portland center was over five million dollars. A center in Salem has a staff of 81 people.

Historically and not too far in the past people in the 65 year and older class would have been financially unable to afford to live in a center such as those established today, even if they had been available. Many factors such as America's economic growth, higher salaries, job security, pensions, savings and investments, and federal social security payments have helped make the development of modern retirement centers feasible and workable.

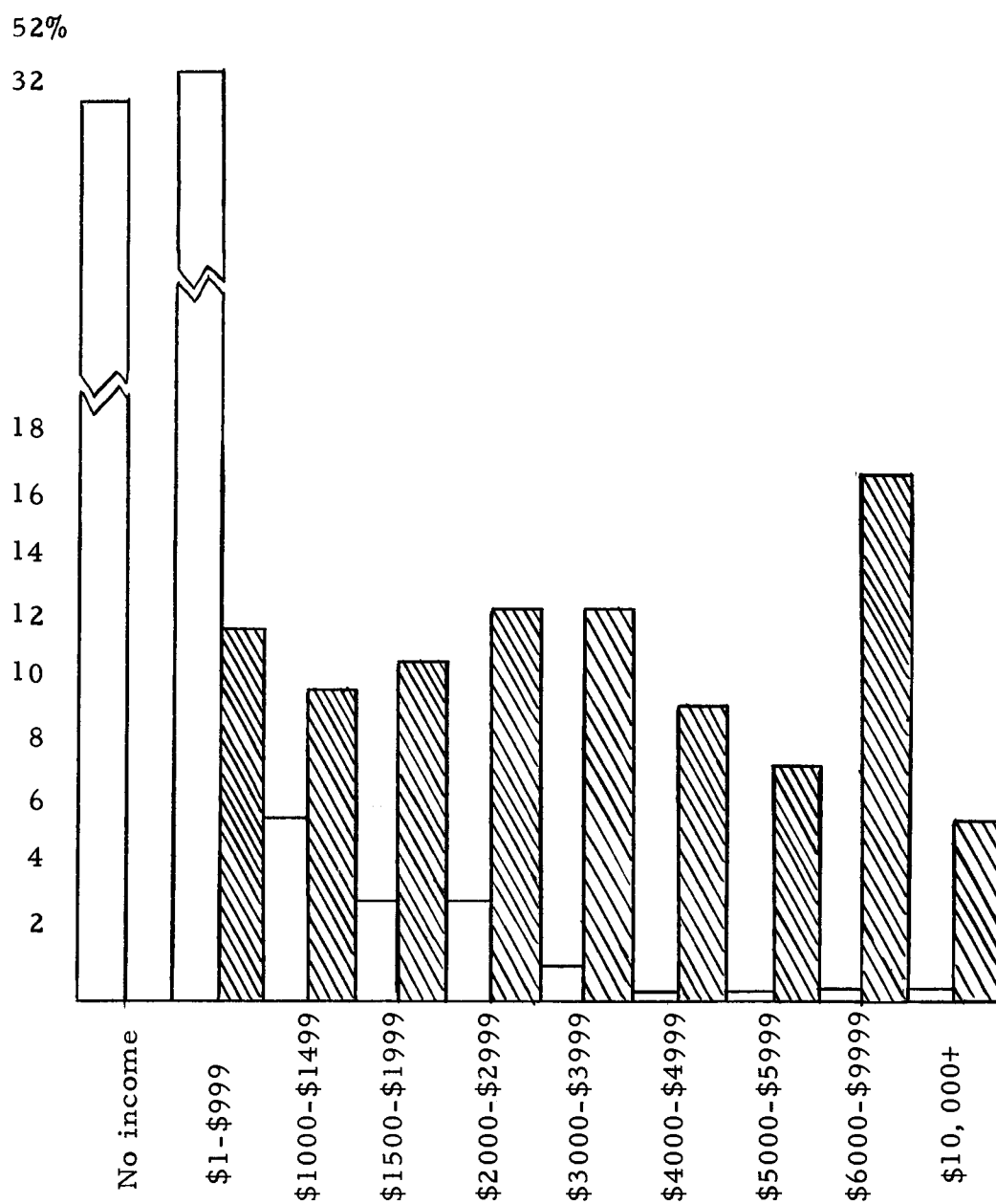
An examination of statistics show that Oregonians of retirement age are financially in fairly "good health". A comparison of Oregon male and female heads of households 65 years and older with the entire United States (based on a 25 percent sampling) substantiates this premise (Figure 3 and 4) (23). Five percent of the males and 31.6 percent of the females in the United States indicated no revenue. For the state of Oregon, however, only three percent of the males and none of the females were in this classification. Thirty nine percent of the nation's males and 58 percent of the females earn between one dollar and \$1,499. In Oregon 18 percent of the males and 22 percent of the females were in this grouping. Earnings from \$1,500 to \$3,999 were indicated for 35 percent of the United States male population and 7.4 percent of the female population. Oregon

Figure 3. United States and Oregon male heads of household 65 years and over yearly income (24)



Oregon shown by pattern

Figure 4. United States and Oregon female heads of household 65 years and over yearly income (24)



Oregon shown by pattern

on the other hand had 48 percent of its males and 37 percent of its female population in this bracket. For incomes over 4,000 Oregonians far surpassed the national average. Forty percent of the males and 41 percent of the females are in this division as compared with 21 percent of the males and two percent of the females for the entire nation.

The evidence reveals that Oregonians in the retirement age class are financially capable of financing the entry fee and the living costs of a modern day retirement center.

#### Population Analysis for Selected Counties

The population density pattern in Oregon exhibits a north-south axis and is closely correlated with the Willamette Valley lowland. Six of the heavily populated counties of the state's thirty six are Multnomah, Lane, Clackamas, Marion, Jackson, Washington, and Benton. All six are in the north-south alignment.

Multnomah with the Portland urbanized area stands first in population with 554,000 people in 1965. The 1980 projection is for 715,000. The 1965 estimate indicates 69,000 people or 12.6 percent to be 65 years old and over. The 1980 estimate of people 65 and over is 85,000 or 11.3 percent. Multnomah County has two centers at present with an occupancy of 559 residents which represents less than one percent of the population.



Lane County dominated by the urban center of Eugene has a 1965 population estimate of 182, 000 and a projected 1980 population of 245, 000. In 1965 the 65 year and older group amounts to 15, 000 or 8.2 percent and it is estimated that this will rise to 24, 000 or 9.7 percent in 1980. At present there is no retirement center located in Lane County.

Clackamas County in the northern, heavy population cluster has 127, 000 people with a projected growth to 177, 000 in 1980. The 65 year and older group in 1965 was 13, 000 or 10.2 percent of the total. In 1980 this group will rise to 19, 000 or 10.1 percent. Clackamas now has two centers both near the Multnomah County boundary. The two centers have 731 occupants.

Washington County, a member of the northern tri-county cluster, is the fourth ranking Oregon political unit. The 1965 population was 111, 000 with 188, 000 projected in 1980. Less than one percent (.9%) of the 1965 population was 65 and older and in 1980 the estimate is 16, 000, or about one percent. Washington County now has one retirement community in operation.

Salem dominates the urbanized area of Marion County, the fifth ranking county of the state. The 1965 population estimate was 131, 000 with 16, 000 or 12.3 percent 65 years old and above. In 1980 the total will be approximately 161, 000 of which 21, 000 or 13 percent will be in the retired category. Marion County has the

distinction of having the largest number of retirement centers with two in the Salem area, one at Mt. Angel, and the other comprising a community center at Woodburn. There are approximately 2,300 occupants with the major portion residing in the Woodburn center.

Jackson County in the southwest portion of the state, the location of Medford, had 82,000 population in 1965 and is projected to expand to 109,000 in 1980. A little over 9,000 people or 10.9 percent are 65 years and older and in 1980 this will rise to 14,000 people or 13 percent. One retirement center with 324 residents is located on the outskirts of Medford.

Benton County, last of the counties considered, is dominated by Corvallis, the county seat and site of Oregon State University. In 1965 Benton County contained 44,000 people and it is estimated that the population will reach 57,000 in 1980. Approximately 3,000 (6.2%) of its 1965 population is in the retired group class and this number is estimated to expand to over 4,000 (7.2%) in 1980. At present one retirement center is available in the city of Corvallis with a residency of 47 occupants.

A recapitulation of the above six counties shows the total 1965 population estimate to be 1,209,000 with 135,000 in the over 65 year class. This is estimated to reach a total of 1,652,000 in 1980 with 183,000 in the 65 year and older category in 1980. The six selected counties represented 63.8 percent of Oregon's 1965 population and

approximately 69.6 percent of the estimated 1980 population. They also contained 67.5 percent of the retired class and will have about 67.2 percent in 1980. The retirement center occupancy space in these six counties is 5,762.

There is a correlation between retired population and the need for retirement centers. Using this correlation as a basis it would indicate that the populous Willamette Valley as well as the southwest section is the best conceivable area for the establishment of centers. The present location of Oregon's centers bears out this fact since eleven of the total thirteen centers are located in the north-south range of the Willamette Valley and the other two in the southwest section. Locational factors are discussed in the ensuing chapters.

In spite of the small percent of people availing themselves of retirement facilities at the present the trend is for retired people to live in such centers. Considerable development, however, is needed to meet the projected population in the retired classification.

### III. TYPES AND SPATIAL LINKAGES OF RETIREMENT CENTERS

Oregon has thirteen retirement centers all of which are located west of the Cascade Mountains. The Willamette Valley, the state's largest population concentration, is the site for eleven of the centers, the remaining two are at Medford and Canyonville in the southwest section of the state. Urban areas dominate the retirement center settings, however, only one is situated in the midst of urban congestion. Only two centers have locations associated with settlements that fall below the 2,500 population class and hence are rural by census standards.

#### Retirement Center Types

The thirteen Oregon retirement centers range in size from the largest which will contain 1,400 units (Woodburn Senior Estates) to the smallest with 84 units (Samaritan Village). Group living is the emphasis and common denominator for the thirteen, however, there exist differences that make it possible to classify them into two categories. Life care and non-life care are the functional characteristic divisions used to categorize centers. Life care centers provide the resident with complete care for the remaining years of his life, and are equipped with medical and nursing facilities for this purpose. Non-life care centers, on the other hand, have no such insurance for

residents although the majority have medical and nursing services available. Each category in turn could be further subdivided as to size, setting, and resources. The following sections describe the thirteen centers in Oregon as a basis for the evaluation.

### Life Care Retirement Centers

Eight of the thirteen centers are of the life care type. Entrance requirements include a medical examination, financial report, and personal references. The resident upon being accepted to the life care center pays an entrance contribution which covers his unit cost, helps amortize the mortgage, and is used in deferring the cost of projected medical needs. Fees range from \$1,750 to \$20,000 depending on the center and the type of unit selected. There is a monthly charge for meals, flat laundry, utilities, upkeep on the unit, entertainment, and recreational facilities.

When a resident is no longer physically or mentally able to care for himself, the resident doctor and the administrator make the decision to move the resident to the nursing home in another section of the center, where special care is provided. When a resident has been moved permanently to the nursing home portion of the center the vacated housing unit is resold. The money from the resale helps in the liquidation of the mortgage and upkeep. The cost of paying for buildings is programmed to assure that the initial residents are

paying no larger an entrance contribution than later arrivals.

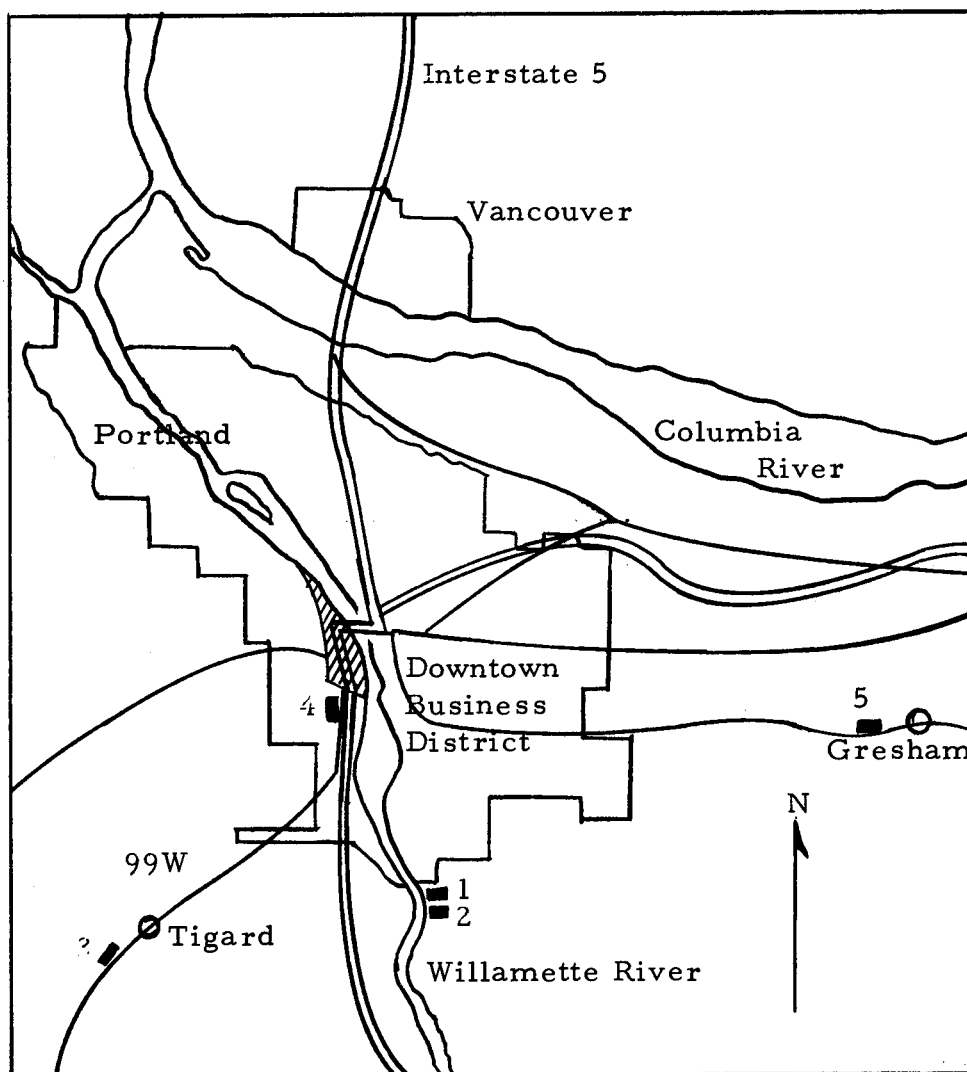
### Willamette View Manor

Willamette View Manor located adjacent to the Willamette River on the outskirts of Milwaukee, a suburb of Portland, was the first retirement center in Oregon. Constructed with Methodist Church finances it has been expanded from its original 243 units by an additional 127 units and a three story hospital wing. The Manor is an impressive five and one half million dollar complex. The original building is an eight story, X-shaped structure. The Court, the later addition, has five stories with a covered walkway to the Manor. The hospital occupies one wing of the Court and is open to the public as well as to Manor residents (Plate I).

There are thirteen different types of units in the Manor ranging in contributions costs from \$7,500 to \$20,000. In addition the monthly life care fee per person is \$135 a month.

A group of Methodist ministers and laymen in the Portland area conceived the idea to build this retirement center for members of their congregations. Plans were started in 1953 and consummated in 1955. Choice of site resulted from easily acquired land at low cost, an unhampered view of the Willamette River, and proximity to churches, shopping, and recreational areas. The situation of the Manor makes it possible for residents to enjoy the variety of

Plate I. Portland Metropolitan Area (16)\*



1. Willamette View Manor
2. Rose Villa
3. King City
4. Terwilliger Plaza
5. The Village

Scale 1" = approximately 4.3 miles

\*The same source (16) is used for all sketches of retirement centers.

amenities afforded by the city of Portland with its many and diverse numbers of shops, restaurants, theatres, and seasonal sporting events. These are easily available through convenient transportation facilities. There is a city bus stop at the front door of the center and the Manor provides a bus and station wagon for resident use.

The apparent success of Willamette View Manor may be attributed to its favorable physical site, attractive accommodations, and a location in Oregon's metropolitan area with its host of opportunities for pleasurable and satisfying use of leisure time.

#### Rose Villa

Rose Villa is situated on a 15 acre site adjacent to Willamette View Manor (Plate I). Sponsored by the Methodist and Baptist churches the center was completed in 1960 and had been programmed to be a part of Willamette View Manor. The idea of integration, however, did not materialize and Rose Villa retains its own identity. The architectural design is ranch style, one story apartments in groups of four to 16 units. There are 12 different floor plans and 224 apartment units. All are occupied. An administration building with library, lounge, infirmary, dining room and recreational building is part of this complex.

Entrance contributions are relatively low, ranging from \$3,500 to \$12,000. Monthly fees vary from \$112.50 for a bachelor



apartment to \$250 for dual occupancy in the largest two bedroom unit.

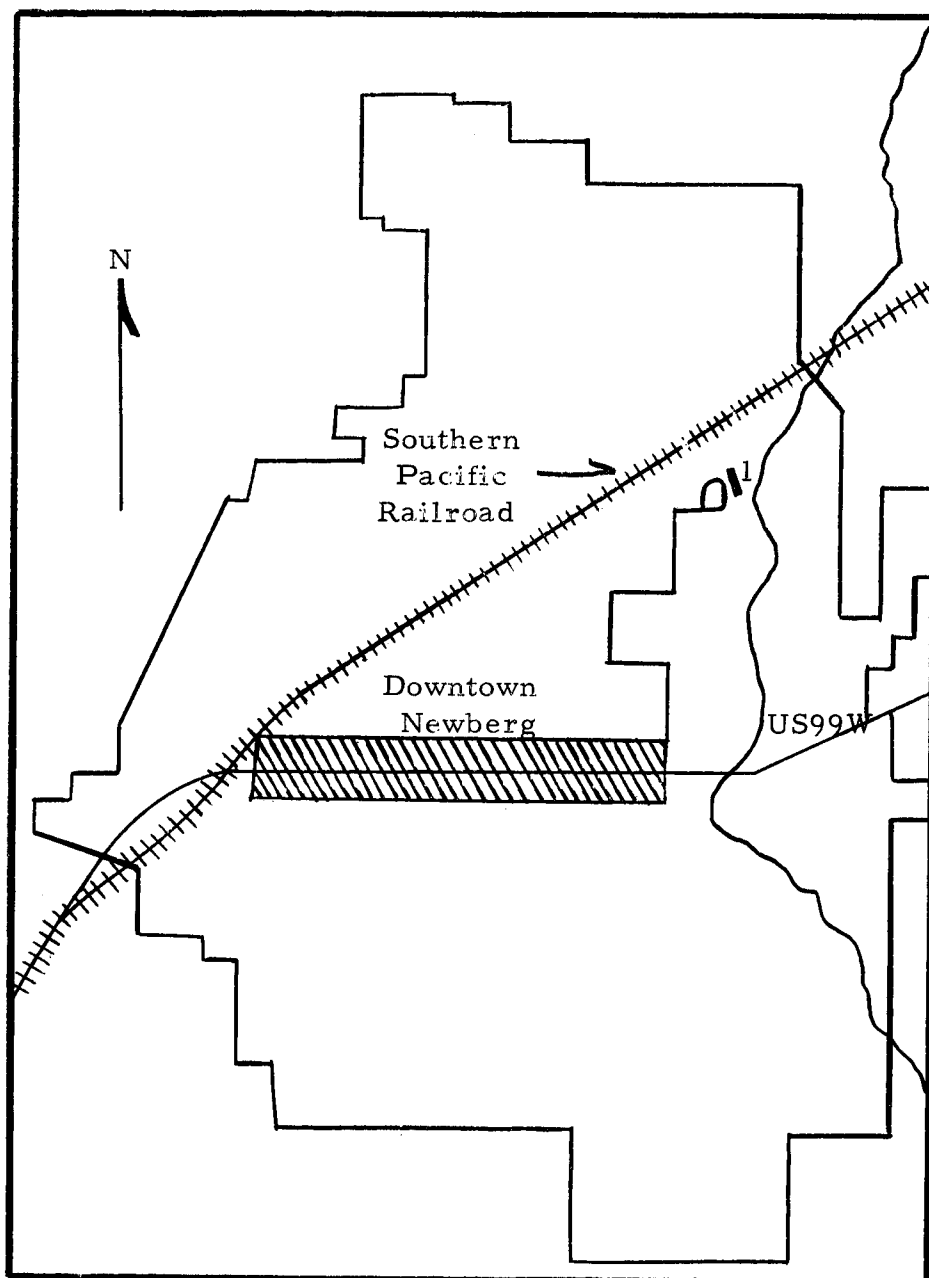
Rose Villa enjoys the same favorable site and situation location as its more pretentious neighbor. In spite of its proximity to Willamette View Manor, however, there is little rapport between the residents of the two centers.

### Friendsview Manor

Friendsview Manor in Newberg, a Quaker sponsored retirement center was opened for occupancy in 1961 (Plate II). Newberg, a quiet, north Willamette Valley city is a focal point for members of the Quaker Church in Oregon and over 60% of Friendsview Manor's residents are Friends. The Manor, a modern, five story cement, highrise building is located on the northwestern edge of Newberg. It is in a transitional zone between urban Newberg and the rural countryside. Adjacent to the Manor is George Fox College, a Quaker institution.

The Manor contains 125 apartments and at present there are 160 residents with a two to one ratio of women to men. The founder's contribution, depending on the type of room, varies from \$7,500 to \$8,500. The monthly fee is \$117.50 for one and \$210 for two persons. An "in depth" case study of Friendsview Manor is included in Chapter IV of the thesis.

Plate II. Newberg--Friendsview Manor (16)



1. Friendsview Manor

Scale 1" = 800'

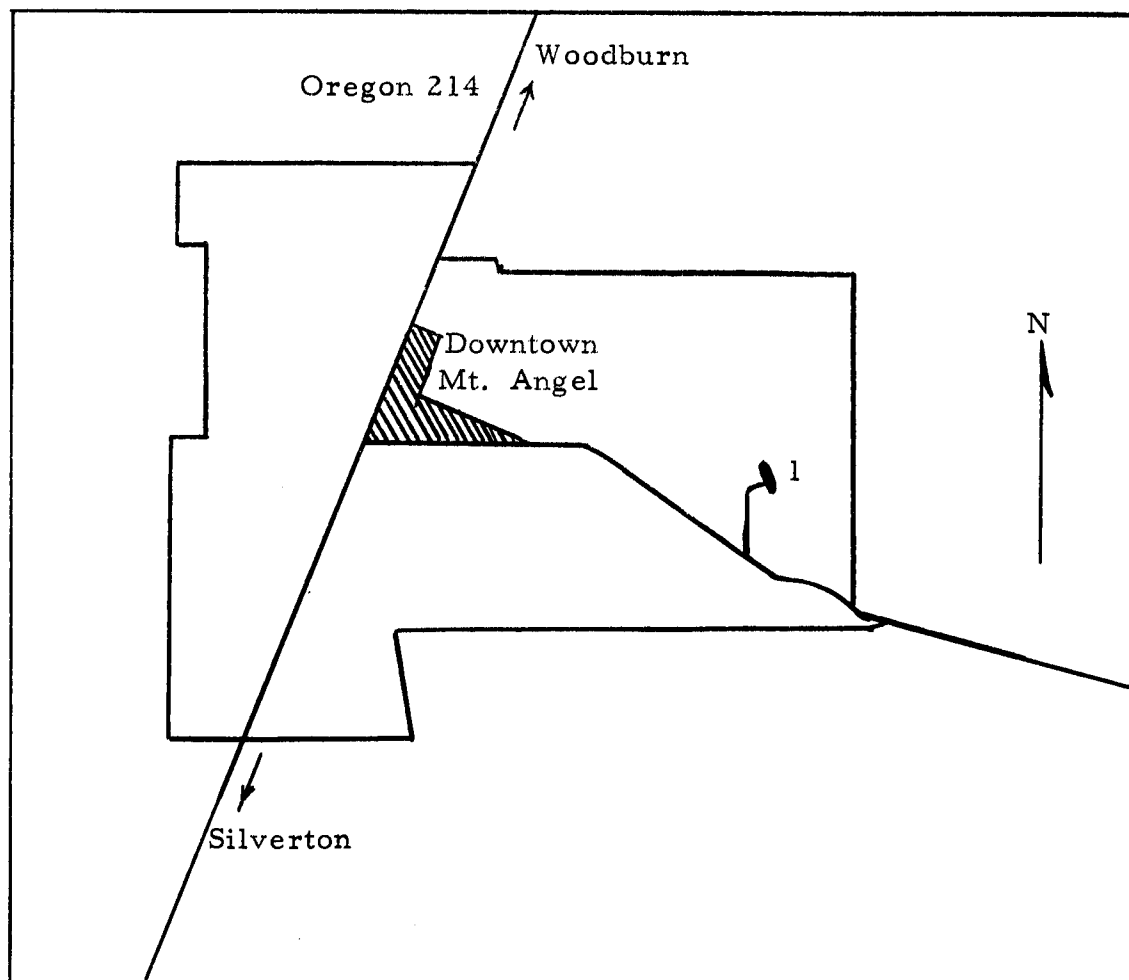
Mt. Angel Towers

Mt. Angel Towers is located on the fringe of the predominantly Catholic village of Mt. Angel (Plate III). The center does not belong to the parish but is "Catholic in orientation and non-denominational in administration." Although centers are operated by numerous Protestant churches, the Catholic Church does not maintain a retirement center exclusively under its jurisdiction. The majority of the center's residents are Catholics, however, adherence to the Catholic faith is not an entrance requirement.

A member of the order of St. Benedict, Reverend Hilderbrand Melchior, OSB, was the originator of the idea and the "driving force" behind the development. The Towers, opened in 1965, is a five story, highrise structure with four, one story garden level wings. There are 132 apartments in the highrise section and 18 in each of the four garden wings for a total of 204 units. Seventy people (July 1966) now reside in the Towers.

To qualify, individuals must be in good health and possess sufficient funds to cover the entrance contribution. This contribution varies from \$5,600 to \$16,000 depending on the type of accommodation desired. The monthly service fee varies from \$125 to \$180 for one person; \$75 is added for dual occupancy. Noon and evening meals are served in the dining hall, however, breakfast may be prepared in the units since most are equipped with kitchenettes.

## Plate III. Mt. Angel--Mt. Angel Towers (16)



1. Mt. Angel Towers

Scale 1" = 800'

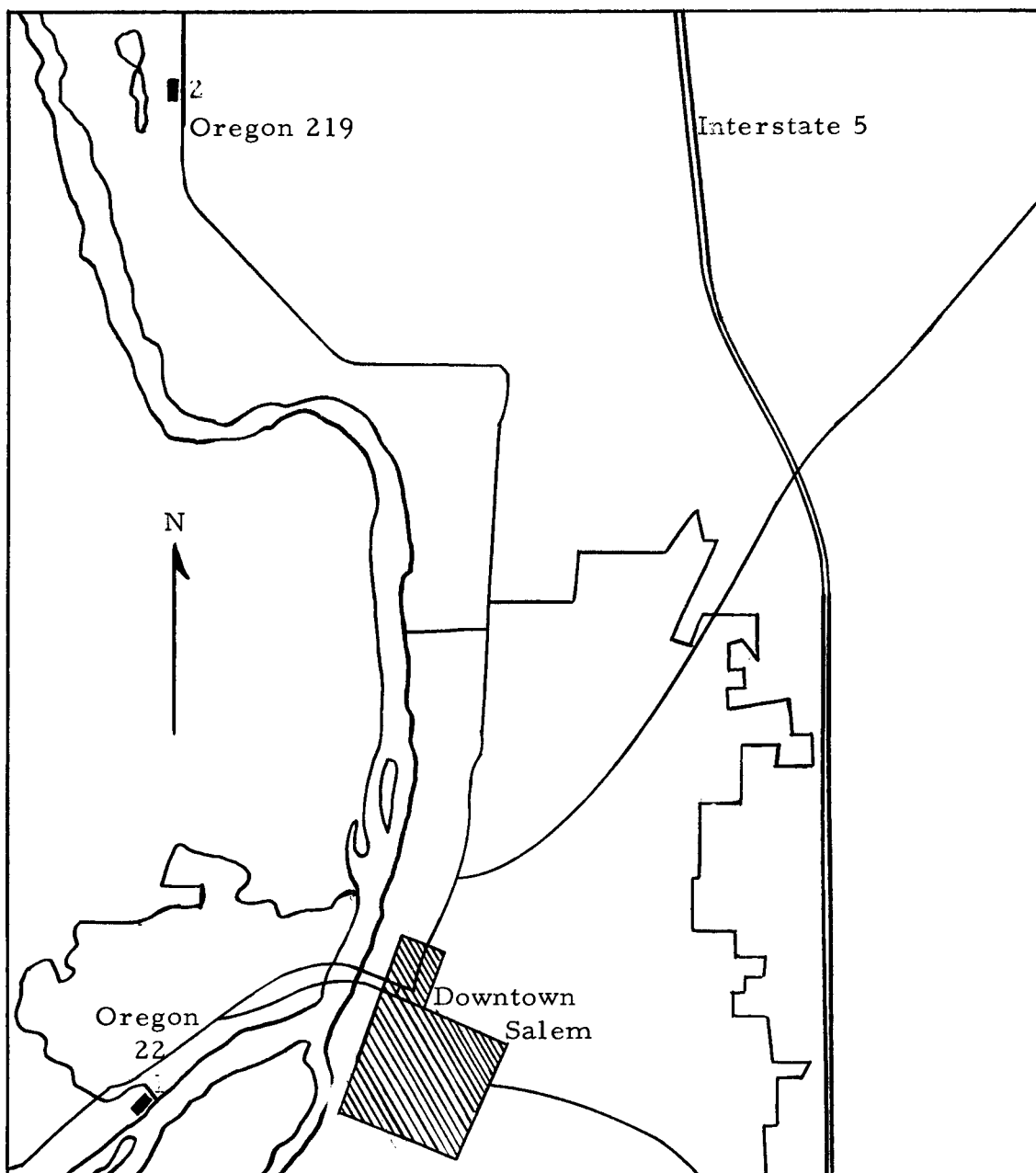
With the exception of the church functions there are few activities or services available in Mt. Angel. The village is without public transportation, however, a station wagon provides transportation three times a week to Salem and once every two weeks to Portland.

### Willamette Lutheran

Willamette Lutheran is located on the northern outskirts of Salem in the Kaizer District (Plate IV). The setting is rural and the center occupies 85 acres of former agricultural land. Land not occupied by buildings is leased to farmers for field crops. The immediate surrounding area is under cultivation by private land holders and devoted to berries and nuts. Contiguous to the property is a small lake with a section of its shoreline belonging to the center.

The center is an attractive two story, brick, U-shaped structure. A wing extends from one leg of the U which is used for recreation. As the name implies, the center, which was constructed in 1962, is under the sponsorship of the mid-Willamette Lutheran Churches, however, non-Lutheran's are also eligible. Age requirement is 62 years; in the case of married couples at least one member must be 62 or over. The entrance fee is from \$6,250 to \$10,500 and the monthly fee is \$140 a month per person. There are 117 dual residencies available. In July 1966 all were occupied, however, there were only six apartments occupied by two persons which makes

Plate IV. Capital View Manor  
Salem--Willamette Lutheran



1. Capital View Manor
2. Willamette Lutheran

Scale 1" = 1000'

a total of 123 residents. The apartments are not equipped with facilities for cooking and all residents have their meals in a large dining hall.

The center is equipped with several indoor recreation rooms and the lake is available for boating and fishing. Less than two miles from the center is a public golf course and a pitch and putt course. A shopping area is four miles to the south and three miles beyond is the city of Salem. There is no public transportation available but the center operates a bus Monday through Friday. Most of the residents, however, own automobiles.

### Capital Manor

Capital Manor is located on the southwest urban fringe of Salem (Plate IV). The site, formerly orchard land, fronts Oregon Highway 22 and is adjacent to the Willamette River. The center is an impressive, nine story, cement structure built in the shape of a broad V. Non-denominational in nature, it was erected in 1963 by a group of Salem business men.

It contains 258 units and at present 501 people are in residence. Entrance contributions are from \$4,250 to \$9,000 and monthly fees are \$142 a month for single residency and up to \$284 for two persons.

The neighboring population, services and perquisites of the

city of Salem have been important factors in the success of Capital Manor. A more detailed analysis of the Manor will be included in Chapter IV of the thesis.

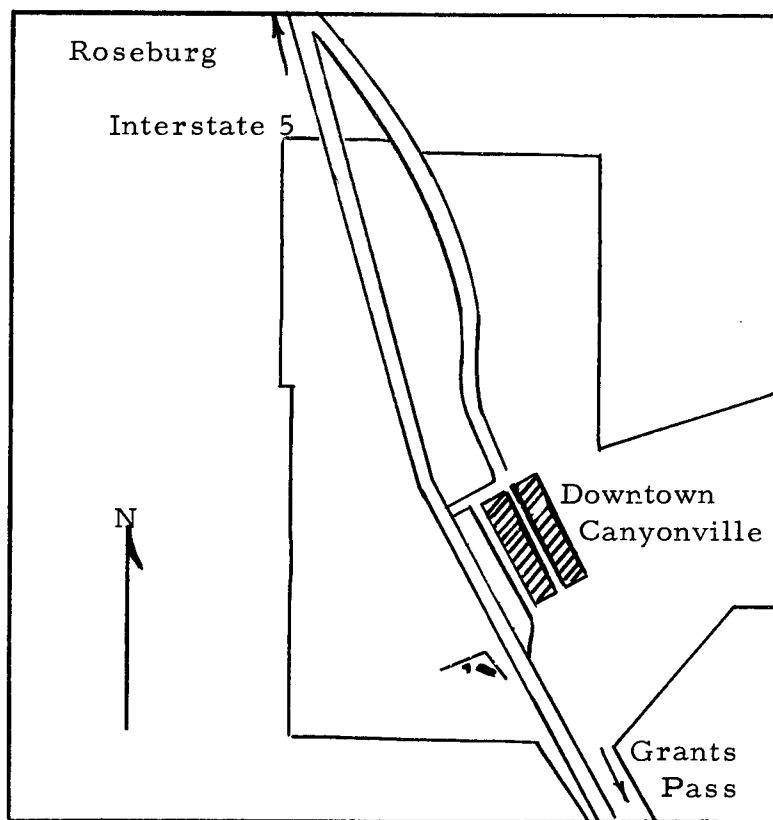
### Forest Glen Senior Residence

Forest Glen Senior Residence is the Seventh Day Adventist retirement center located at Canyonville (Plate V). The Forest Glen building dominates the landscape of Canyonville, a small lumber-oriented community of less than 1,500 inhabitants. Its site is a five acre plot adjacent to the town's community hospital. The six story, highrise, non-denominational center, established in 1962, was initiated by a group of Seventh Day Adventist doctors who operate the community hospital. The center was planned as a retirement home for members of the Adventist faith but members of other denominations are accepted.

The attractive, modern structure has two divisions. The second floor is devoted to nursing care and the other five are used by the active residents. There are 89 apartments with entrance contributions of \$5,000 and an average monthly fee of \$122 per person. The division on the second floor with 20 rooms has dual usage and functions as part of the life care plan and nursing quarters. Individuals entering the nursing section pay an entrance fee of \$1,500 and a monthly care fee of \$200. Three meals are prepared according to the



## Plate V. Canyonville--Forest Glen Senior Residence(16)



1. Forest Glen Senior Estates

Scale 1' = 800'

dietary practices of the Adventist Church. There is a kitchen for resident use on the third through sixth floor.

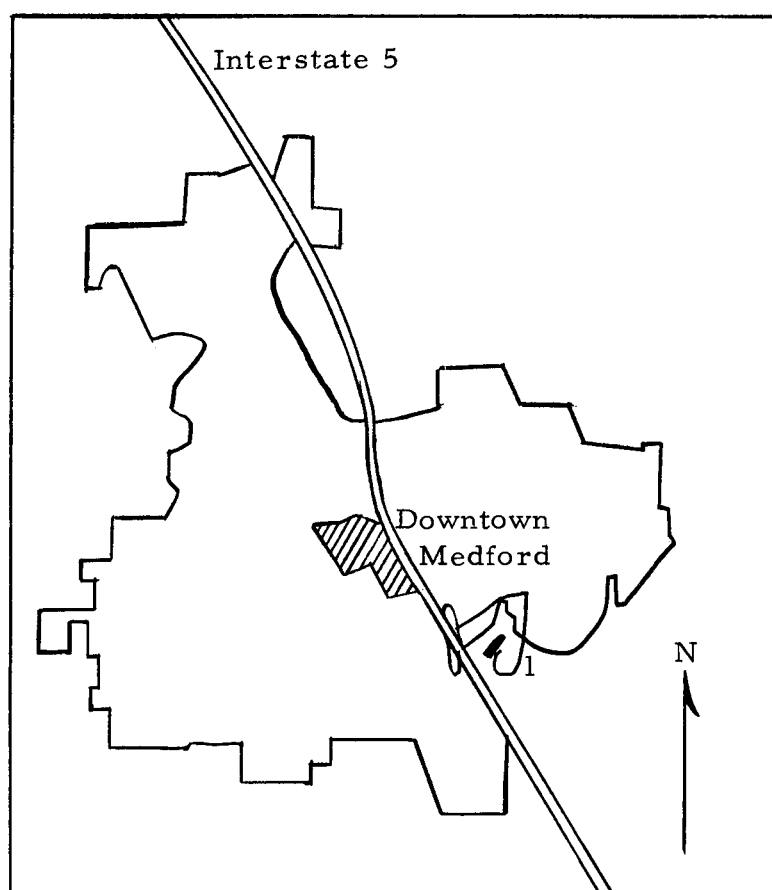
Neither the living units nor the nursing section is filled. Perhaps the center's location in Canyonville is a weakness. Canyonville has few civic activities and is isolated from larger communities.

### Rogue Valley Manor

Rogue Valley Manor occupies about seventeen acres of landscaped grounds located on a hill overlooking the city of Medford (Plate VI). Access to the Rogue Valley hinterland, availability of land, and the picturesque setting were significant locational factors. The hill top setting, surrounded on three sides by agricultural land, is more suburban in character than rural. The Manor, opened in 1961 under the combined sponsorship of the Methodist, United Presbyterian, and Episcopal Churches, is a ten story, highrise structure constructed in the shape of a wide V. The center contains 256 apartments which are of nine types to provide diversity. A large dining room is located on the first floor, however, residents may do some cooking since 85 percent of the apartments have kitchenettes. Presently there are 325 occupants. There are 60 couples, 184 single women, and 20 single men. The average age is 75 years.

Individuals at the age of 60 may be admitted after fulfilling

## Plate VI. Medford--Rogue Valley Manor (16)



1. Rogue Valley Manor

Scale 1" = approximately  
3,200'

three requirements--(1) three character references to assure compatibility, (2) a medical examination, and (3) an assurance of sufficient financial assets for the entrance contribution and the monthly fee. Finances are used for the monthly life care fee which varies according to the type of apartment chosen, the entrance contribution, and the life care assurance fund. The assurance fund cost is calculated by multiplying each year of the member's life expectancy by \$600. The fund expense cost is repaid to the member at the rate of \$50 a month, beginning at the half way point in the life expectancy. In essence, a resident with a life expectancy of ten years pays an assurance fund fee of \$6,000. After five years have past, one half of the expectancy period, he or she is refunded the fee at the rate of \$50 a month. In addition, interest at the annual rate of four percent is paid monthly on the deposit balance beginning at the time of entrance into the Manor. At death the balance remaining on deposit is paid to the member's estate less any money owed the Manor.

Recreation facilities of the Manor include club and craft rooms, a hobby shop, and auditorium. The city of Medford is about two and one half miles from the center and has numerous services and recreation outlets available to the center's residents. The Manor provides bus transportation to downtown Medford eight times daily, Monday through Friday.

### Non-Life Care Retirement Centers

Five retirement centers in Oregon are non-life care centers. Two are communities and the other three are apartment dwellings. Residency is subject to several stipulations. A candidate to a community area purchases a home. Those choosing the apartment type dwelling may take a lease for a year or pay an entrance contribution. In the latter type, prospective residents are subject to a medical and financial investigation.

The home owner in a non-life care center owns the title to his home and can do what he wishes with it within certain specific regulations. The owner has the normal expenses for maintenance and living and is charged a monthly fee for recreation. This fee is decided on by the residents. When he elects or has to sell or give away his home the only stipulation is that the new resident must be over 50 years of age with no children under 18.

Residents under the yearly lease plan pay no entrance contribution. The lease expense is divided into eleven payments, the first payment for two months is for the first and last month. Utilities and one meal a day are included. There is no maid or laundry service.

Apartment dwellers pay an entrance contribution as well as monthly charges. The entrance contribution helps defray the initial

cost of the building. The monthly charge is for utilities, maid and flat laundry service and in the maintenance of recreation facilities. Food costs are not included, there is, however, a restaurant in both of the centers so residents may purchase meals. When the resident leaves the center the apartment reverts back to the corporation.

### Terwilliger Plaza

Terwilliger Plaza, a modern retirement apartment building, is located on the fringe of the downtown section of Portland (Plate I). Located directly across from Duniway Park at the beginning of the southwest hills, the Plaza has an unhampered view of the city, the Willamette River, and the Cascade Mountains. Another significant location factor is the nearness to the population density of the Portland metropolitan area.

Terwilliger Plaza is the largest non-profit apartment housing for senior citizens ever financed under the Federal Housing Administration in Oregon. There are 342 units in this 12 story building which consists of 170 studio apartments, 136 one-bedroom apartments, and 36 two-bedroom apartments. Entrance contributions range from \$3, 125 to \$7, 825; monthly service fees vary from \$85 for a single person to \$170 for dual occupancy.

The Plaza has a main floor lobby, and a lounge on each floor. The second floor lounge has been converted into a library. On the

main floor there is a craft room, shop, recreation room, auditorium, and dining room. The dining room seats 125 persons and is available to both residents and the public. Since all units have kitchen facilities the dining room was not used to full capacity and was operating at a loss. To offset this loss a grocery store was constructed in an unused portion of the basement and profits have made meals more economical as well as diminishing dining room losses.

The Plaza is now filled to capacity. Fifty eight men and 342 women comprise the 400 residents. The average age is 72. The minimum age for entrance is 60 years, however, a spouse may be younger. Two relatives or friends may share an apartment, as well as husband and wife. On the death of a spouse or partner, the survivor retains the right to residency. The apartment reverts to the Plaza upon the decease of the single occupant.

There is a nine bed infirmary to care for cases of temporary illness. A profit making nursing home has been constructed adjacent to the Plaza and members may apply for entrance when the need arises.

### King City

King City is a retirement community located on the fringe of Tigard, a suburb of Portland (Plate I). King City, occupying 250 acres of former agriculture land, is bordered on one side by the

Tualatin River and on the other by the four lane Southwest Pacific Highway. Residents must be 50 years of age or over with no children under 18.

A nine hole golf course is the focal point for most of the proposed 649 home sites. There are seven basic house types with each home plan having three variations. Home and lot prices start at \$12,950. Included in the purchase are underground utility installations and paved streets. Future plans call for a town hall, arts and crafts center, locker room, sauna baths, and a swimming pool. A 100 bed convalescent hospital, 20 acre shopping center, a restaurant, and a motel are under construction.

### The Village

Located between Portland and Gresham is a semi-rural setting is the Village, a Seventh Day Adventist center, opened in 1963 (Plate I). It is composed of 25 single story, brick-wood units containing 120 apartments which occupy a twelve acre site. Seventh Day Adventist philosophy dominates the living pattern of the residents, however, less than 40 percent of the residents are members.

The Village has been planned for people with modest incomes. Four types of apartments are available with entrance contributions ranging from \$1,700 to \$3,500. The monthly fee is from \$95 for singles to \$155 for dual occupancy. At present there are 153



residents with a three to one ratio of women to men. The average age is 76.

A ten patient infirmary is provided and there are plans for the construction of a 64 unit nursing section. Each resident pays a monthly health service fee, in addition to subscribing to "Medi-Care".

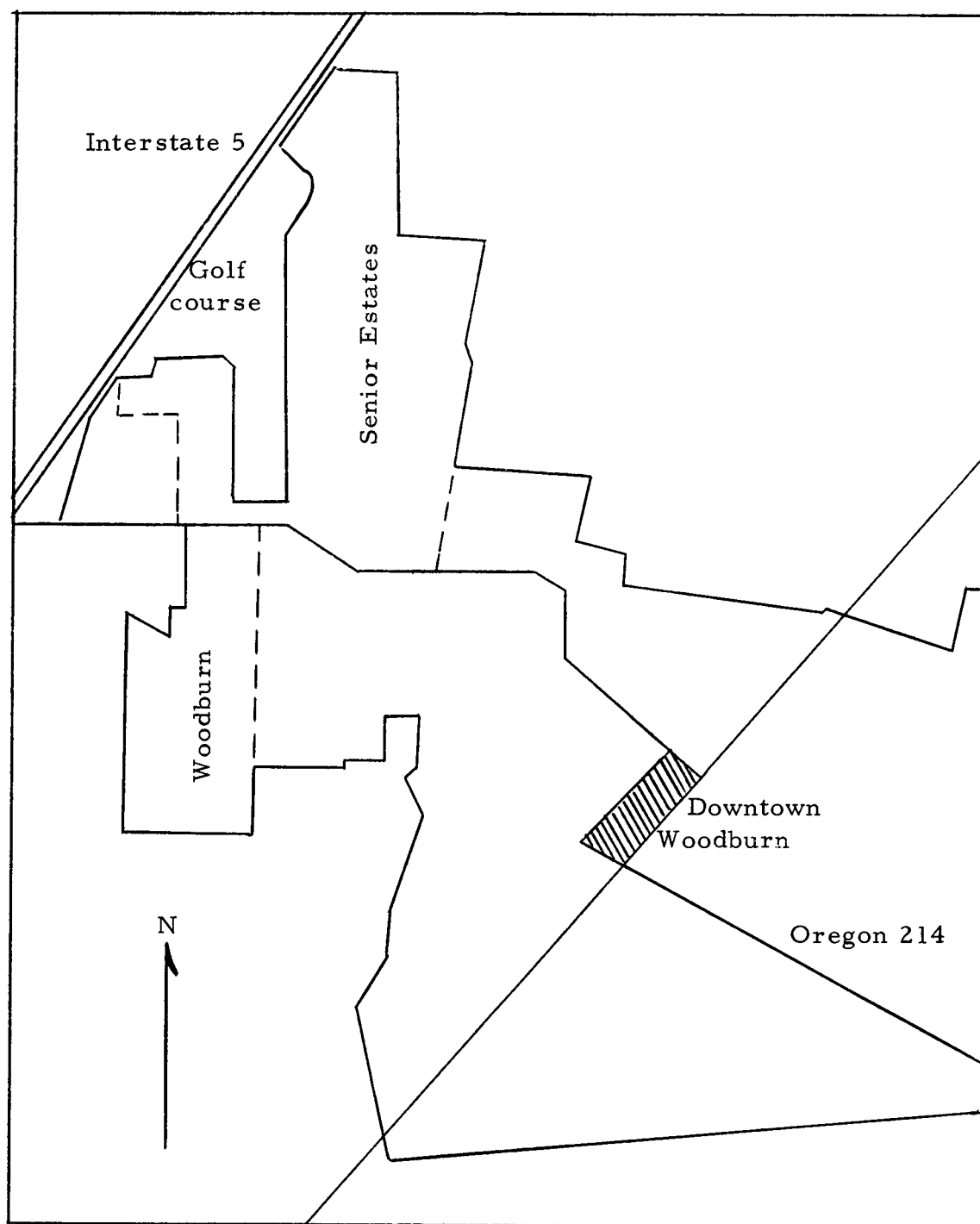
Each apartment has a kitchen and dining area. In the community building there is a commissary where fresh fruits, vegetable, dairy products, and packaged staples may be purchased. Meals are served in a dining area for those who do not wish to cook.

Twenty bus stops are scheduled daily between Gresham and Portland. The majority of the senior citizens, however, use the facilities of Gresham rather than Portland.

#### Woodburn Senior Estates

Woodburn Senior Estates within the city of Woodburn is a retirement community for people at age 50 and over (Plate VII). Agricultural land previously in grains has been converted into a site for a community of 1,400 homes. At present there are 800 units that have been built and occupied. House selection is from ten master plans with three major house types in each plan. The price range is from \$9,975 to \$16,750. An 18 hole golf course fronts the property serving as a year around recreational area and acting as a

Plate VII. Woodburn--Woodburn Senior Estates (16)



Scale 1" = 800'

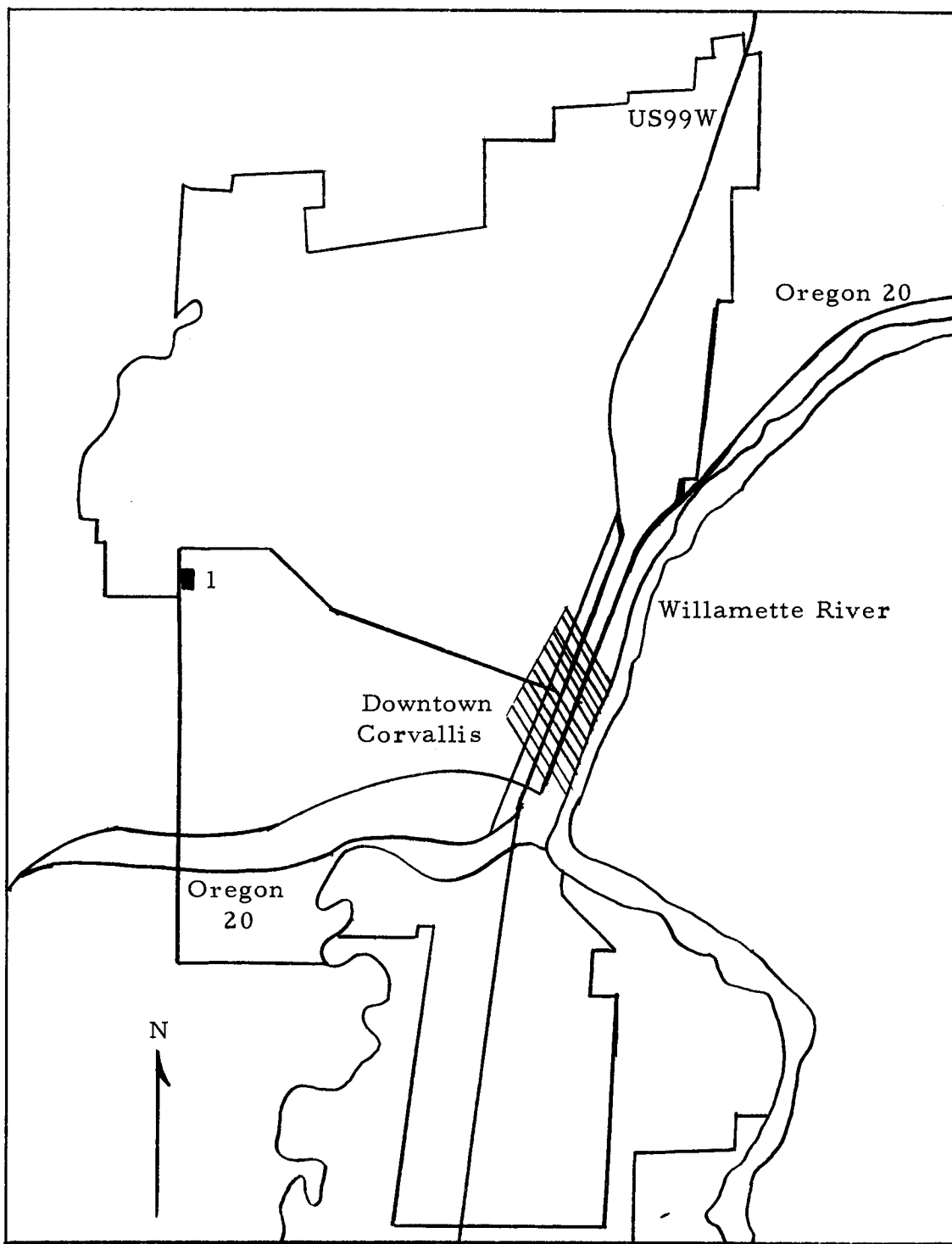
buffer to the traffic of Interstate 5. Associated with the Estates is a modern shopping center with a great variety of services. The combination of residences and available services gives Woodburn Estates the appearance of self-sustaining community. A more detailed description and analysis of this center is presented in chapter IV of the thesis.

### Samaritan Village

Samaritan Village, sponsored by the Episcopal Church of the Good Samaritan in Corvallis is unique for Oregon in its retirement program (Plate VIII). The Rt. Reverend James W. F. Carman, Bishop of the Diocese of Oregon had a dream of four retirement centers in the Oregon diocese. Corvallis was selected as the first all Episcopal sponsored center because land adjacent to the Episcopal Church was available. Opened in 1965, residents take a yearly lease on apartments without founder's fee or contribution. At the end of a year residents may renew for another year, if physically able to care for themselves. If the resident becomes incapacitated he is asked to secure other residency.

The nine building village is constructed of wood and brick and laid out in the form of a spread X, and occupies a three acre plot in the western residential section of Corvallis. Eight of the units are two story apartments, the other is a community center. The

## Plate VIII. Corvallis--Samaritan Village (16)



1. Samaritan Village

Scale 1" = 850'

number of units per building vary from eight to 16. There are 18 one-bedroom apartments and 66 studio apartments. Individuals 62 and over are eligible, however, in the case of a married couple only one need be 62 to qualify. The resident pays his yearly lease in eleven installments. The first payment is for the first and last months, the others are for one month each. Monthly rates are from \$147.50 for one person to \$224.50 for two. Presently there are 53 residents--37 single women, four single men and six couples. The average age is 74: eleven residents are in their sixties, 34 are in the seventies and eight are eighty or over. Almost half of the residents are from Corvallis, and in addition, ten moved to Samaritan Village because they had relatives living in Corvallis.

One major meal is served daily in the dining room. Other meals may be prepared in the apartment since all are equipped with kitchens. Local stores deliver food stuffs upon request.

Samaritan Village has an excellent location in being adjacent to its sponsoring body. It is five blocks from the Good Samaritan Hospital, under the same sponsorship, which has a modern 50 bed nursing and convalescent wing. Six blocks away is a small shopping center, and the city bus line furnishes transportation. An added locational attraction is its proximity to Oregon State University which provides a variety of activities.

The preceeding material has typed the Oregon retirement

centers as well as presenting a vignette of each center. The following chapter will be concerned with a detailed analysis of three chosen centers and go beyond the above generalizations.

#### IV. RETIREMENT CENTER CASE STUDIES

Three retirement centers were chosen as representative samples for detailed analysis of sites, situations, physical facilities, entrance requirements, costs, and other pertinent data. Of the three chosen two are life care centers, Friendsview Manor in the small community of Newberg and Capital Manor adjacent to Salem. Woodburn Senior Estates was chosen to represent a community retirement center.

##### Friendsview Manor

Friendsview Manor is a life care retirement center established by the Friends Church in Newberg, Oregon. A group of Quakers inspired by the success of Willamette View Manor in Portland, the first retirement center in Oregon, set out to establish a modern retirement home for people of their faith. The cornerstone of the building was laid in 1958 and the center was opened for occupancy in the spring of 1961. Immediately following the opening over fifty individuals established residency. Although Quakers were the developers of the idea and consummators of the plan it was not designated to provide accommodations mainly for Quakers. Anyone is eligible within the framework of the entrance requirements. Newberg, however, is a Quaker community and at present 65 percent of the

Manor's residents are members of the Society of Friends.

Friendsview Manor's site is located on a fifteen acre plot adjacent to the urban fringe of Newberg. To the east of the center is George Fox College, a Quaker institution. To the south is a residential section of Newberg and land in agriculture lies to the north and west. The major portion of the Manor's acres extends in the direction of the farm fields to assure a quiet, rural type of environment. It was a foregone conclusion that the retirement center would be located in Newberg; mainly because there was a large number of Quakers in Newberg and a plot of land was available. The chosen site was land owned by the Friends Church adjacent to the athletic fields of George Fox College; it was sold to the Manor for a nominal fee.

### Site Selection

In addition to potential residents and price and availability of land the site had other advantages. The founders were interested in semi-rural surroundings and Newberg afforded this since the main business district was ten blocks from the site. In reality the Manor lies in a transition zone between town and country. The nearness to the business district makes the usual small town stores, doctors, dentists, lawyers, theatre, library, post-office, fraternal organizations, and churches readily available. Individuals interested in



more diversified services and recreation may find them in the city of Portland nineteen miles to the north. U. S. Highway 99 West runs through the center of the town and two bus lines provide roundtrip transportation to Portland. There is no city bus service to the Manor. The city transit company, however, will furnish public transportation when it is requested. The majority of the residents own automobiles or walk to the downtown area.

Friendsview Manor affords the residents with ample recreational areas. Hess Creek flows through a northern section of the site and has been stocked with trout for the fishermen. A picnic area is adjacent to Hess Creek. Trails have been built and the northwest corner of the acreage has been left in its natural state. A garden area has been set aside for those interested in the raising of flowers and vegetables. A miniature golf course, croquet fields, and horse-shoe pits complete the outdoor recreation facilities. Members of the Manor may participate in Newberg's church, club, and fraternal organizations as well as take advantage of the cultural opportunities of George Fox College.

### Physical Plant

Friendsview Manor consists of a modern, cement and brick, five story, highrise building. The main floor contains the administrative offices, dining room, lounge, and some residential units.

The second through fifth floors are resident apartments and each floor has a small lounge and kitchen. The typical unit is 288 square feet and is furnished with wall-to-wall carpeting and window drapes. Each room has a view of either the manicured front lawn or the rural landscape in the rear. The daylight basement contains the infirmary, hobby rooms, craft center, recreation rooms, and heating plant.

A common dining room is used by the residents. Saga II, an international food service concern, prepares and serves the meals using college student help. In addition to the prepared meals the kitchen on each floor makes it possible for residents to cook meals or make snacks.

Friendsview Manor has a thirteen bed infirmary with a nursing home license. The infirmary is used for illnesses not requiring hospitalization, as a convalescent ward for residents returning from a hospital or as a nursing home for those with long-term chronic ailments. The Newberg Community Hospital is about one and one half miles from the center.

### Admission Requirements

To be eligible for admission to Friendsview Manor one must be a non-user of tobacco and alcohol, be 65 years of age or older, ambulatory, and have a satisfactory medical report. Earnest money of one hundred dollars must accompany the application form.

The form furnishes information on personal history, listing of relations, health record, financial statement, and references. Following a three month checking period the applicant is given the Manor's decision. Entrance fees range from \$7,500 to \$9,000 depending on the size and location of the living quarters. The entrance fee is attractive for couples since it is the same fee charged for a single individual.

A resident may terminate his stay at the Manor at any time. He is required, however, to procure a replacement for his unit with help from the administration. In addition he loses his earnest money and pays one eighth of the original fee for each year of his stay. Only four percent of the total residency have elected to leave the Manor. This minority in every case returned to their prior residence. Over 65 percent of those leaving were from outside of the state.

The life care fee is \$117.50 per person per month. For two people living in one unit the fee is \$210 for both. Residents receive their meals, heat, utilities, room service, a limited amount of laundry work, general infirmity care, use of the living space and the facilities of the parlor, library, hobby, craft, and recreational rooms. There is no extra charge for infirmity care for the first sixty days of any one illness. After 60 days however, the infirmity fee is \$40 a month which is an addition to the monthly \$117.50 a

month fee.

Life care at the Manor does not include funeral expenses, outside physicians, medicines, surgery, hospitalization, eye glasses, dentures, special nurses, trips or excursions. Individuals are expected to furnish their units and provide themselves with suitable clothing, bedding, and linens.

### Profile of Occupants

One hundred and sixty residents live at Friendsview with an average age of 77 years. The sex division is 67 percent female and 33 percent male. There are sixteen sister-sister relationships, six sister-brother parings, one brother-brother paring, and one mother-daughter relationship.

The majority of the residents living or having lived at the Manor are from Oregon (139 of the 190 checked). California was second with 22. The Pacific Northwest states of Washington and Idaho furnished 16 residents. The balance came from Arizona, New York, Michigan, Iowa, Kansas, Montana, Alaska and Hawaii. Portland has been the largest Oregon contributor with 39 followed by Newberg with 32. Only six residents from Oregon came from east of the Cascade Mountains (Table II).

The majority of the residents are completely retired, however, a number pursue their former occupations on a "retirement basis".

One tunes pianos and manages a music store, two teach part-time at the college, three serve as college custodians, two are in the cabinet making business, two are dress-makers, and five serve as office secretaries. Prior to retirement the residents had varied occupations. Homemaking and teaching were the leaders with 49 listings each. There were 16 farmers, 12 ministers, seven missionaries, and seven nurses. The balance was divided among skilled male and female labor and professionals.

Table 2. Prior location of residents from Oregon

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Portland	39
Newberg	32
McMinville	7
Hillsboro	6
Forest Grove	5
Salem	5
Milwaukie	3
Barton	2
Medford	2
Monmouth	2
Corvallis	2
Oregon City	2
Albany	2
Eugene	2
Vale	2
Coos Bay	2
Ontario	2
Wecona Beach	2
Champoegi	1
Tillamook	1
Oak Grove	1
Hood River	1
Grants Pass	1
Jefferson Co	1
Mapleton	1
Scotts Mills	1
	<hr/>
	137

### Capital Manor

Capital Manor is a life care center located adjacent to the city limits of West Salem, a community on the left bank of the Willamette River. The city of Salem occupies a site immediately across the river from its satellite. The Manor, opened in August 1963, was financed by lease hold fees and a 40 year FHA insured construction loan mortgage on the property. A group of Salem civic leaders initiated the building of the Manor which is tailored for retired individuals who had been in the middle class income bracket. A large number of people in the retired classification living in the Salem area was part of the stimulus to construct the center. It is a private enterprise development and is not associated with any particular religious denomination. Prior to the completion of the center a vigorous advertising campaign was organized and ads were placed in national magazines, religious publications, chamber of commerce journals, and newspapers.

### Site Selection

The choice of site was a 20 acre plot of orchard land which adjoined Oregon Highway 22. The center was built, however, 500 yards back from the road to allow space for landscaping. Directly across the highway is a 500 yard area which extends to the Willamette

River. This space has been set aside for a projected park in the near future which will enhance the center's property. The other three sides of the property have residential developments but the size of the site minimizes the aspects of an urban flavor.

The Manor is within four blocks of a shopping district in West Salem and within two miles from the central business core of Salem with its shops, churches, fraternal organizations, clubs, and recreation outlets. There are nine state parks within two hours driving and four golf courses are in the vicinity. The city of Salem's transit authority includes the Manor on its schedule and delivers passengers from the front door to downtown Salem in less than ten minutes.

### The Physical Character

The residence is an attractive and impressive nine story, cement structure build in the shape of a broad V. There are 258 apartment units and all face either the Willamette River or the center's landscaped grounds. The main floor contains the administrative offices, a 20 bed infirmary, the main lobby, dining room, kitchen, social room, and some apartments. The second through ninth floors are the apartment locations with central lobbies on the third, fifth, seventh, and ninth floor. The ninth floor also has a library. The basement, in addition to the service requirements of the center, has hobby shops, craft and sewing room a beauty shop, and a bachelor

room for the men.

There are five basic unit plans for the apartments. The average unit, however, consists of a living room bed alcove, bathroom, and closet area. Pullman kitchens can be installed in most units. Each apartment has wall-to-wall carpeting and window drapes. Residents provide their own furnishings.

Capital Manor hires its own chef who prepares three nutritious meals daily which are served in the central dining room. Tables for two and four are placed throughout the room and attractively dressed waitresses serve the meals. Individuals who wish may use their Pullman kitchens to prepare meals but they are still obligated to pay for meals served in the dining area.

Eighty one employees service the Manor. Eight are in administration, eight in medical care, 32 in food service and housekeeping, four in janitorial work, and 29 in miscellaneous jobs.

### Admission Requirements

Applicants desiring residence at Capital Manor must be 62 years of age or older, be ambulatory, and have sufficient finances to cover the entry fee and the monthly life care costs. Health records and financial reports are carefully scrutinized and the applicant is interviewed before admission.



### Woodburn Senior Estates

Woodburn Senior Estates is a non-life care retirement community on the western edge of the city of Woodburn. Established as a land speculation corporation in 1960 Senior Estates was developed to provide senior citizens with homes in a retirement community complete with the services and amenities associated with many communities. Woodburn Senior Estates became a reality in 1960 with the construction of three homes. The second year 30 more were built and at present (July 1966) there are 800 dwellings constructed in addition to a shopping plaza and various other buildings.

The site was to be between two large urban centers, Portland and Salem, with easy access to a well-developed transportation net for automobile use. Further site requirements were a large expanse of land with gentle terrain for individual homes and a golf course. The final site factor was a location near a small established community.

### Site Selection

The approximately 350 acre site was formerly Willamette Valley farmland producing wheat and barley. It presently is surrounded on three sides by land sown to blue grass and creeping red fescue for seed. The agricultural location was one of the factors in the site

choice since a rural atmosphere was desired by the developers. A second significant location fact was the proximity to the agriculture-oriented city of Woodburn. To assure the conveniences of city water, street lights, sewage, storm sewers, and fire and police protection the Estates petitioned to be annexed to Woodburn. In addition Woodburn whose city center is approximately one mile from the site has, like most of the typical mid-Willamette Valley towns, retail stores, garages, medical facilities, fraternal organizations, and numerous churches.

A third site factor was the relative levelness of the terrain which facilitated the construction of homes and other buildings and the golf course. Availability of transportation facilities played a role in site selection; Woodburn Senior Estates is located at the intersection of Oregon State Highway 214 and the north-south freeway Interstate 5. Twenty-eight miles to the north is the Portland metropolitan area and seventeen miles south is the city of Salem.

### Physical Facilities

Unlike the life-care centers with the usual highrise building dominating the site, Woodburn is a community of attractive single-story homes arranged in a grid alignment with certain sections having a crescent pattern to break the regularity. There is no monotony to the homes since there are a number of house plans which

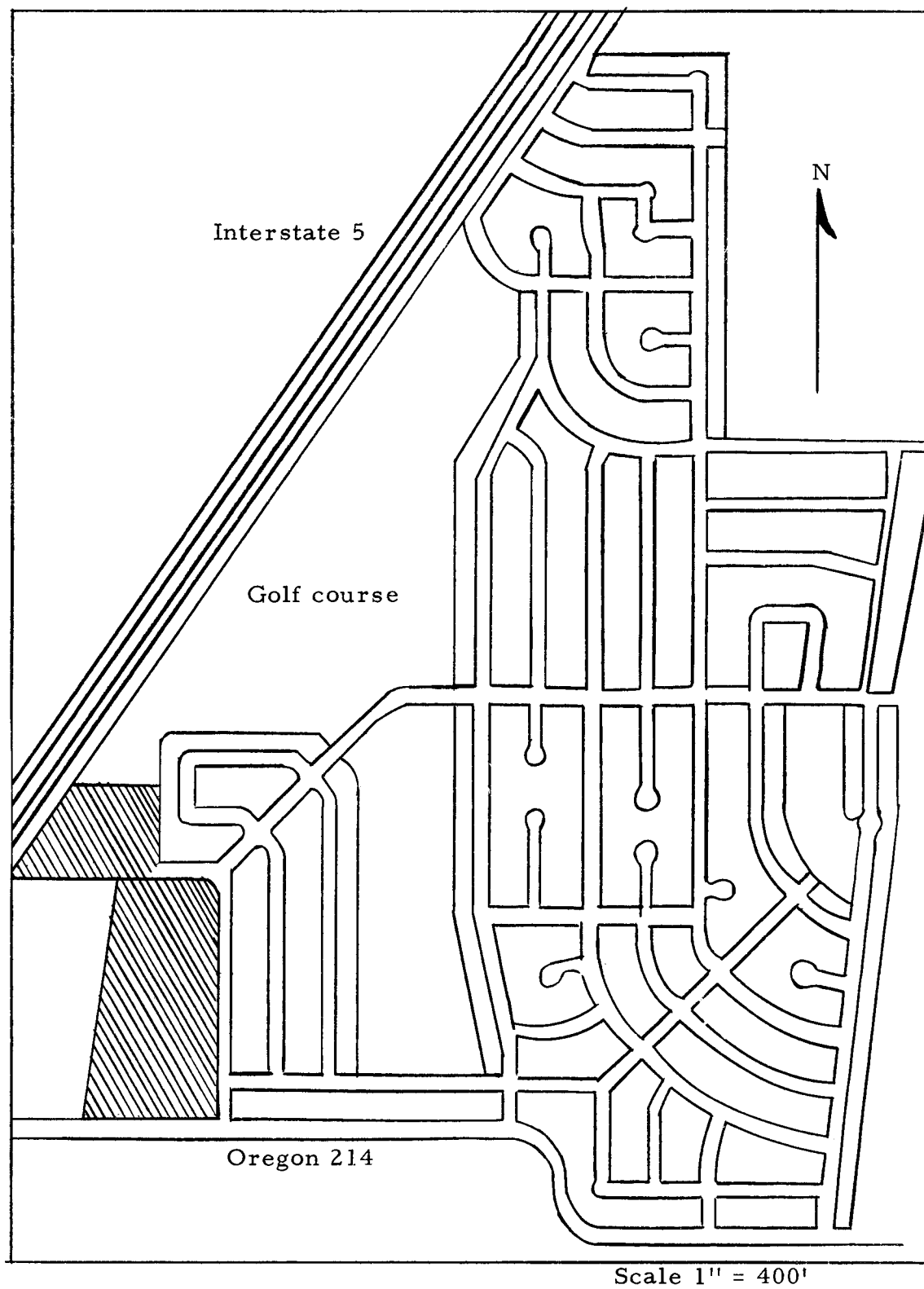
range from one bedroom single garage structures to three bedroom accommodations with a double garage. There are many different exterior designs which assist in providing community personality.

A nine hole golf course is an asset in attracting prospective residents and also enhancing the value of home sites that overlook the course. Golf is a major theme in the leisure life of the community. The terrain of the course is relatively flat and the climate allows almost year-round play. A clubhouse is adjacent to the course for golfers and it also has space for craft, hobby, and miscellaneous recreation. Adjoining the clubhouse is a heated swimming pool. A park area near the east margin of the site completes the outdoor recreation atmosphere of the community (Plate IX).

On the southwest corner of the site is a motel for the convenience of friends and relatives. South of the motel is an apartment complex which affords housing opportunities for people not wishing to invest in a home. The ground floor apartments have front and back entrances, wall-to-wall carpets, all appliances, a private walled patio, and covered parking. Apartment residents are a definite part of the community; they share the activities and enjoy the recreation privileges.

The final service facility of the center is the Fairway Shopping Plaza. The Plaza contains a bank, large super market, variety store, drug store, beauty and barber shop, antique shop, florist,

Plate IX. Plan of the original section of Woodburn Senior Estates  
(16)



travel bureau, insurance agency, service station, and laundry and dry cleaners. Not only does the Plaza service the community it also vies for the business of the surrounding area with downtown Woodburn.

Woodburn Estates does not have a hospital, infirmary, or nursing quarters. The city of Woodburn, however, has a small hospital for emergencies. Specialized medical needs may be satisfied by the facilities of Portland or Salem.

The majority of the center's residents own automobiles and the ease of access to the north-south freeway facilitates transportation. There is no city bus line in Woodburn but the Estate operates a shuttle bus through the property and to downtown Woodburn. Bicycles have become a popular means of short distance transportation within the community.

### Entrance Requirements

Entrance requirements for Woodburn Senior Estates are relatively simple. The age minimum for a single person is 50 years. In the case of a married couple only one partner needs to meet the age requirement. Children of couples must be 18 years of age or older. Being retired is not an entrance stipulation nor is a medical report needed. There is no founder or entrance fee to pay. Outside of the age and child age limitations acceptance into the community

is contingent on the purchase of a home.

An individual or couple has a variety of choices in home sites and architecture. There are ten basic floor plans and 26 different exterior designs. Prospective residents may use their own house style if it conforms with the planning regulations of the developers. New appliances are not part of the basic home but may be included in the original cost. The lot size is approximately 4,500 square feet which allows space for landscaping. All utilities and improvements are included in the price of the lot. Streets are paved and shade trees planted in parking strips.

Prices range from \$9,975 to \$16,750. After the contract has been signed it takes approximately 90 days to build the home. The prospective resident may pay cash or use conventional financing arrangements such as FHA. The equity in the home belongs to the owner and he may dispose of his property at any time and to anyone provided the transaction meets with the regulations of the Senior Estates.

Expenses are comparable to home expenses in most normal communities. Unlike the life-care arrangement the individual pays no monthly fee. His chief responsibility is for the upkeep of his property and for the appearance of his grounds. There is a small monthly fee of \$4.50 per couple for recreation privileges and each resident has a vote in the management of the recreation activities.

The Estates employ a social director and a golf professional.

The manager of the Senior Estates was generous in his cooperation but records were not kept on prior residents or on occupations of residents. It was indicated that a canvassing of the residents would not be appreciated by the management or the residents and for this reason census of the residence was not carried out even though it was much desired.

Woodburn Senior Estates have plans for 1400 homes. At present (July 1966) over 800 have been built and all are occupied. There are 1600 residents in the community and most of these are from the states of Oregon and California. The average age of the residents is estimated at 68 years.

The developing company has initiated an active campaign to publicize their project. Newspaper advertising and a mailing program has been the primary means of informing the public. In June of each year there is an "open house in our town" program which features a selected group of houses for inspection. It is estimated that the retirement community will reach its level of population saturation by 1970.

## V. SUMMARY AND CONCLUSIONS

The retirement center is the new pattern of settlement in Oregon. Only a few years ago there were no modern living accommodations in the state especially designed for people in the retired class. The alternatives for many of these people were to maintain their own homes, be admitted to "homes" operated by religious or fraternal organizations, rely on relatives, or move to states where retirement centers were available.

The initial attempt to provide residence centers for the senior citizens of Oregon was in 1955 when Willamette View Manor in Portland was constructed for an occupancy of 243 residents. In 1960 two more were available. In the space of eleven years development organizations had thirteen centers in operation and over 4,000 people are making use of these new facilities. Several more centers are in the stages of construction and planning.

Retirement centers are not "old folks homes"! They are modern apartment dwellings or individual homes grouped into a community. Centers are places where senior citizens may buy a home or lease an apartment for the balance of their lives. By choice they live in a social environment that is compatible to their age group. In many cases financial problems associated with future living and possible hospitalization and medical care are minimized. The guarantee



for future care is provided by the initial fee and the relatively modest monthly charges. The retirement center furnishes a satisfying way of life especially in providing opportunities for the residents to be members of a still dynamic population group.

Group living for senior citizens is the fundamental philosophy in the background of all retirement centers. On a functional basis, however, there exist significant differences that make possible two broad divisions. The groupings are the life care and the non-life care center. Life care centers furnish the resident with complete care for the balance of his life. This includes comfortable living quarters, meals, medical and nursing conveniences, and recreation facilities. The non-life care center has similar living features but does not guarantee complete medical or nursing care. Whereas the health-care feature is the major factor for broad separation there exists enough differences among all centers that makes each one individualistic.

#### Summary of Location Factors

The spatial arrangement system of the centers was studied and several conclusions reached. The majority of the centers in Oregon have been concentrated in the western portion of the state. Every center lies west of the Cascade Range. The major share of the centers, eleven of the thirteen, are in the Willamette Valley. The other

two are in southwestern Oregon. One is in Canyonville in the upper Umpqua drainage and the other is adjacent to Medford. Five centers lie within the Portland metropolitan area.

A number of factors were identified which influenced the location of centers at sites in western Oregon. Perhaps the most significant is the preponderance of population in this portion of the state. Three of the largest Oregon urban centers, Portland, Eugene, and Salem, and the major share of the most heavily populated counties lie in the Willamette Valley. The nine Willamette Valley counties had an estimated population of 1,268,000 in 1965 which is 67 percent of the state's total and 139,000 of these people were 65 years and older.

The correlation between population numbers and retirement centers is high. Furthermore associated with areas of high population densities are necessary adjuncts vital to center location which would include medical and hospitalization care, transportation, shopping, recreation, and cultural advantages.

It is doubtful that climate was a deciding factor in selection of locations, however, the mildness of the marine climate of western Oregon is certainly not a disadvantage. Here temperature extremes are rare; winters and summers are relatively mild when compared to areas in eastern Oregon. Precipitation is possible in every month, however, the heaviest concentration is during the cooler

season of the year. Amounts vary from 40.9 inches at Portland in the north to 19.3 inches at Medford, the most southerly center. The major share of the precipitation is in the form of rain. Green landscapes for months of the year compensate for the persistently cloudy sky which is often the general rule from October through March.

Proximity to a shopping center played a locational part in various degrees. They are a necessity in the home community type since individuals live in private dwellings and must depend on a source of food supplies and other household requirements. The two community home centers have shopping plazas as part of their complex. Two apartment non-life centers have established commissaries in their buildings chiefly for groceries but other commodities must be purchased on the outside. A shopping district may not be as vital to the life care center but nevertheless proximity is an asset. Life care centers are concerned primarily with the basics of living and not the incidentals, consequently a convenient shopping area has decided advantages.

Medical aid, hospitals, nursing and convalescent care are vital considerations in site selections. Since most centers are affiliated with urban areas locations near medical centers was not a major consideration. Nursing homes and infirmaries are a part of the physical make-up of most centers, however, few have hospitals. This is not a serious handicap because no center is more than seven

miles from hospital care.

Easy access to principal arteries of transportation was a factor in site selection of most retirement centers, and availability of vicinal transport services is even more significant. Eight centers have public transit services to their doors and four provide busses. In all cases no center is isolated from a main highway nor lacking in public or private transportation facilities.

Since most centers are associated with urban areas the problems of church attendance, fraternal organization meetings, recreation, and cultural opportunities are minor. It is true, however, that the centers associated with larger cities have decided advantages over their more rural counterparts. A few centers, however, have weighed the advantages of large city against a semi-rural location and the latter has prevailed.

A location with access to recreation facilities is significant. A further consideration would be space and the nature of the space on the site for outdoor recreation possibilities. There is no exact age at which a person loses the desire to recreate and living by "bread alone" can become a monotonous and sterile existence. Use of leisure time is a serious problem for the senior citizen and it is the responsibility of center administrators to provide stimulating and satisfying leisure time outlets. Certain forms of recreation are furnished by hobby and game rooms or plots of land on the grounds

that can be used for gardening. These activities can be satisfactory but the center that has easy access to an urban area affording concerts, lectures, the theatre, and spectator sports is fortunate. One outdoor recreation activity that has merit is the game of golf. Golf is a sport that does not make too many physical demands on the body particularly if the terrain is flat. Golf gives physical exercise, mental relaxation and a sense of competition. The courses at Woodburn Senior Estates and King City are the centers' major attractions. Many of the apartment type centers have available space on their grounds to construct a nine hole pitch and put course. Future centers should consider this form of recreation.

### The Potential Need

The potential for retirement centers in Oregon is great particularly in the Willamette Valley. In the next 14 years, that is 1980, it is projected that Oregon's total population will increase to 2,373,085 people. Of this number 271,903 people would be 65 years of age or older. Sixty eight percent of this age group or approximately 186,000 people would be residing in the nine Willamette Valley counties.

Education will be a factor in retirement center occupancy. The connotation of "old folks homes" is disappearing and the retired individual is discovering that centers offer a rich and satisfying way of life. No doubt valid information will be received by the "hand to

mouth" route but it is the responsibility of the center to disseminate information and encourage investigation.

The cost of living in Oregon's retirement centers is within the reach of a large percent of the state's population in the 65 year and older class. Statistics estimate that 40 percent of the individuals of retirement age in Oregon have incomes of \$4,000 or more. In life and non-life care centers the initial fee, depending on accommodations, ranges from a low of \$8,125 at Terwilliger Plaza to a high of \$20,000 at Willamette View Manor. The lowest monthly cost for a single person is \$85 at Terwilliger Plaza and the highest is \$147.50 at Samaritan Village.

Presently there are thirteen Oregon retirement centers with 6,732 units and 4,322 residents or 2.2 percent of Oregon's population of 65 years of age and older. If the percent of residents in centers remains constant there would be over 7,000 residents by 1980. Since many retired individuals, except those living in retirement communities, are widows or widowers projections have to be made on the basis that each unit will only house one resident. Due to the favorable acceptance and growth of centers during the past thirteen years it is felt that the popularity will increase and the percent of residents will escalate from 2.2 percent to about 5 percent or 11,500 individuals by 1980.

The success of the new living pattern in Oregon is assured.

The need for retirement centers is corroborated by the fact that two new centers are scheduled to open in Portland by the end of 1966 and two are in the process of construction in the city of Eugene.

Retirement centers are an integral part of the landscape mosaic of Oregon. Although centers do not play a dominant role in the gross living pattern they nevertheless make a notable contribution to population settlement.

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## APPENDIX

## APPENDIX

THE SPATIAL LINKAGES OF RETIREMENT CENTERS  
IN OREGON

This questionnaire is designed to provide information on the type, development, facilities, and reasons for location of retirement centers in Oregon.

Name of unit: \_\_\_\_\_

Location: site and situation

Supported by \_\_\_\_\_

Administered by \_\_\_\_\_

Size in acres \_\_\_\_\_

City blocks \_\_\_\_\_

% of land devoted to buildings \_\_\_\_\_

recreation \_\_\_\_\_

parking and roads \_\_\_\_\_

Year originated \_\_\_\_\_

Growth

Type of structures

Number of employees office \_\_\_\_\_

services \_\_\_\_\_

food service \_\_\_\_\_

medical \_\_\_\_\_

part time \_\_\_\_\_

other \_\_\_\_\_

total \_\_\_\_\_

Number of apartments \_\_\_\_\_  
     library \_\_\_\_\_ books  
     lounges \_\_\_\_\_  
     hobby shops \_\_\_\_\_  
     sewing rooms \_\_\_\_\_  
     dining room seats \_\_\_\_\_  
     auditorium seats \_\_\_\_\_

Number of residents   male \_\_\_\_\_  
                             female \_\_\_\_\_  
                             total \_\_\_\_\_

Average age of residents   male \_\_\_\_\_  
                                     female \_\_\_\_\_  
                                     total \_\_\_\_\_

Entrance requirements

Medical facilities

Recreational facilities indoor

Recreational facilities outdoor

Adjacent public and private recreational facilities

    spectator sports \_\_\_\_\_  
     golf course \_\_\_\_\_  
     city parks \_\_\_\_\_

Services provided   grocery stores \_\_\_\_\_  
                             beauty shops \_\_\_\_\_  
                             barber shops \_\_\_\_\_  
                             drug stores \_\_\_\_\_  
                             clothing stores \_\_\_\_\_  
                             gift shops \_\_\_\_\_  
                             et cetera \_\_\_\_\_

Proximity to urban area

Public transportation bus \_\_\_\_\_  
major street or highway \_\_\_\_\_

Shopping centers in proximity grocery stores \_\_\_\_\_  
beauty shops \_\_\_\_\_  
barber shops \_\_\_\_\_  
drug stores \_\_\_\_\_  
clothing stores \_\_\_\_\_  
gift shops \_\_\_\_\_

Other services provided in the adjacent areas churches \_\_\_\_\_

library \_\_\_\_\_  
civic center \_\_\_\_\_  
medical \_\_\_\_\_  
fraternal organizations \_\_\_\_\_  
theater \_\_\_\_\_  
museums \_\_\_\_\_

Entrance contributions \_\_\_\_\_

Living costs \_\_\_\_\_