



Leisure World of Maryland

Master Plan for Trust Properties Appendix

FINAL REPORT: MAY 9, 2025

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Town Hall 1: Summary and Themes

Leisure World Trust Property Master Plan

Town Hall Meeting #1

Executive Summary

Process

A Town Hall Meeting was held on November 29, 2023, in the Clubhouse I Ballroom as the initial resident engagement activity for the Trust Property Master Planning process. The goal of this meeting was to introduce the Master Planning process, broadly discuss the goals, and gather resident input.

The Town Hall meeting was attended by approximately __ residents.

A short presentation introduced the Leisure World Master Plan Working Group and consultant team, provided an overview of the process and schedule, and discussed the format for the meeting.

The core element of the Town Hall was a facilitated discussion of small groups of residents (approximately 8-10 per table). Facilitators at each table included consultant team members and resident volunteers. Note-takers at each table were resident volunteers. Instructions and questions were provided to facilitators and note-takers prior to the Town Hall meeting. Each table had the following questions:

1. Why do you choose to live at Leisure World?
2. What do you like the most?
3. What would you like to see changed/improved?
4. What outdoor amenities, services, or spaces do you utilize the most, and the least?
5. What indoor amenities, services, or spaces do you utilize the most, and the least?
6. What recreational amenities are not here that you wish were here?
7. How important is golf for you?
8. What is your biggest transportation concern?
9. What are the most and least convenient ways to travel across Leisure World?
10. Are there areas of the campus that you feel are unsafe or difficult to access for travel?
11. Do you believe the monthly fees at Leisure World are consistent with the level of services, amenities, and other offerings of the community?
12. If land were available, what types of additional housing would you like to see at Leisure World?

Answers to these questions were documented on note pads.

A report back to all participants was made at the end of the meeting where facilitators announced their group's consensus top three items, although some groups listed more than three. Those top priorities were also included in the tabulation and are listed below.

Some volunteer facilitators and note-takers provided answers to questions after the meetings and those have been added to the responses.

Following the Town Hall Meeting, TG+P transcribed the individual table's responses. The responses were then compiled, categorized, and tabulated to provide a high-level summary and to assist in analyzing and

prioritizing recommendations. Care was taken to omit responses that weren't clear or not applicable to the questions posed. Our best judgement was used to categorize the responses received.

Conclusions/Take-Aways

Outdoor amenities are some of the most beloved and highly valued assets in the community. These are important contributors to one of the most valued characteristics of Leisure World, which is the sense of community. There is a high diversity of outdoor amenities that is possible, given the size of Leisure World, and this is at the top of the list of what residents love about their community. Nevertheless, there are additional amenities that are desired, as well as improvements to existing amenities. The most valued outdoor amenities are also ones associated with moderate and vigorous exercise which are important in promoting and maintaining health.

1. Outdoor Amenities - Walking: Amenities associated with walking are highly valued and are one of the most mentioned in several questions. In addition, research shows that regular walking is one of the largest contributors to population health – it can both prevent chronic diseases and improve management of existing chronic diseases. The following are key take-aways from comments associated with walking:
 - Walking infrastructure is highly used.
 - There is a strong desire to expand the walking system.
 - The golf course is equally valued for the opportunities to use the open space for walking (as well as a visual amenity that improves the walking experience).
 - The provision of increased shade is desired.
 - Improvements of pedestrian crossings that increase safety are highly desired.
 - Accessibility improvements are highly desired, such as handicap ramps at intersections.
2. Outdoor Amenities – Pickleball Courts, Children's Playground, Dog Park, Open-air Amphitheater are the second-most mentioned outdoor amenities that are desired.
 - Pickleball:
 - Pickleball is a popular sport (that continues to increase in popularity) that promotes moderate to vigorous exercise, as well as social interaction and a sense of community.
 - There is a desire to increase the number of pickleball courts.
 - There is a desire to have dedicated pickleball courts. In addition, tennis players would prefer not to have courts that are marked for both sports, since this leads to difficulty in play.
 - Children's Playground:
 - Since Leisure World is an active adult community, the amenities are focused on their needs. However, when family members visit that are, or have, young children a convenient children's playground is lacking and desired.
 - Dog Park:
 - Dog Parks are highly desired amenities in communities, in general, that provide an activity for dogs, but also provide a significant opportunity for social

interaction and a sense of community for residents. A dog park is desired within Leisure World that is convenient and allows social interaction with residents.

- Open-air Amphitheater:
 - The Pandemic increased the awareness of the importance of open-air activities. An outdoor performance or gathering space would provide additional social, recreation, and educational opportunities during the appropriate time of year. Increasing outdoor programming and events would help to include residents that cannot or do not wish to attend indoor events and can reinforce the social and community atmosphere of Leisure World.
3. Indoor Amenities: There are a significant variety of indoor amenities that are made possible by the size and population of Leisure World. These are highly valued. Almost all comments relate to the improvement or use of existing facilities versus the provision of new facilities. Specific and most mentioned comments follow:
- There are a significant number of diverse clubs in the community that use the indoor clubhouse spaces. This places demands on the facilities ranging from scheduling to space needs:
 - A desire for additional storage for clubs was expressed.
 - Multi-use rooms:
 - There is a desire for updated technology.
 - There is a mismatch between the size of rooms needed and those available during the most desirable time slots.
 - The clubhouses were built in _____ and renovated in _____. There was a comment that the buildings are dated and need an updated image and an updated lobby.
 - The existing auditorium was mentioned as needing updating, improvement, and maybe even compliance with building code.
 - The indoor pool was noted as needing improvement -specifically the locker rooms.
4. Safety concerns focused primarily on entry gates and pedestrian improvement:
- Concerns were expressed about the configuration of the Norbeck Entrance where greater stacking space is needed for vehicles so that they don't back up onto Norbeck Road.
 - Concerns were expressed about the configuration of the Main Gate area along Georgia Avenue – specifically, there was concern about the turning movement into the shopping center.
 - Ensuring accessibility in general throughout the community is a concern.
 - Providing adequate lighting throughout the community is a concern.
5. If room were available, over 80% of responses expressed a desire for additional housing, however, the type of housing preferred is diverse.
- The highest number of responses desire to have some type of hotel or guest housing available.
 - Excluding hotel or guest housing, a third of comments expressed a preference for single-family and two-thirds for other types of residential.

- Assisted Living was noted in 12% of responses to address the needs of existing residents as they get older.

Individual Question Conclusions

The following pages contain the supporting documentation for the conclusions and key take-aways:

- Conclusions for each question
- Supporting Analysis for conclusions for each question that includes a categorization of comments and a graphic representation of the comments
- Documentation of Comments from each table

Q1 - Why do you choose to live at Leisure World?

1. The top reason for choosing to live at Leisure World is the amenities. This suggests that the upkeep and the provision of appropriate amenities is a priority. Diversity and valuing of diverse amenities is apparent. Ease of living/access to amenities can be inferred.
2. The second top reason for choosing to live at Leisure World is the sense of community. Physical recommendations should not impede the existing sense of community and should seek to facilitate interactions and provide sufficient and appropriate spaces for interaction.
3. Location also appears to be a large determinant. This may suggest that the market is local and regional and that marketing efforts are best focused on a smaller geographic area.

Q2 - What do you like the most?

1. Outdoor and Indoor amenities are elements that residents like the most.
2. Outdoor amenities appear to be more highly valued than indoor amenities. Walking (and walking infrastructure) is a highly valued amenity, as well as general greenspace. Golf was mentioned several times, but more specificity is found in a later question.
3. Indoor amenities are the second most mentioned item. Pools are very important. A focus on health and fitness can be seen.
4. Recommendations should seek to preserve, enhance, and/or expand amenities. Plans need to focus on repair and upkeep in addition to future expansion of facilities.

Q3 – What would you like to see changed/improved?

1. New amenities are ranked highest for changes and improvement. This suggests that there are amenities that are missing. Requested physical elements noted are:
 - a. Pickle Ball Courts
 - b. Bike paths/lanes.
 - c. Dog Park
 - d. Electric Charging Stations (amenity in addition to sustainability feature)
 - e. More Walking and Jogging Trails

- f. Storage for clubs
 - g. Open Air Amphitheater
 - h. Shade for Walks
 - i. Pharmacy/Drugstore
- 2. Capital Improvements are ranked second highest and include the following:
 - a. Clubhouse image and lobby
 - b. Accessibility and safety of sidewalks and crossings
 - c. Auditorium
 - d. Indoor and Outdoor Pools
 - e. Updated technology in conference rooms
- 3. Environmental Sustainability is ranked as third highest and includes the following:
 - a. More sustainable landscapes (less monocultures, provide shade, appropriate spacing, support wildlife, conservation).
 - b. Consider alternative energy (i.e. Solar).
 - c. Provide more electric charging (cars and golf carts).
 - d. Increase garden plots.
- 4. The desire for high-quality landscape and walking amenities is reflected in answers for the top three categories and should be a focus of recommendations. Updates to the Clubhouses and indoor amenity rooms were also an area of focus for residents.

Q4 - What outdoor amenities, services, or spaces do you utilize the most, and the least?

- 1. Walking trails are the most used of all the amenities.
- 2. Golf, Pool, and Pickleball are the second most used.
- 3. The top four most-used outdoor amenities are all focused on moderate to vigorous physical activity.
- 4. The only two amenities mentioned in the least-used category are golf and swimming. This may be because these activities have a higher “barrier to entry” or require specific skills.
- 5. Pickleball was mentioned both as a highly used amenity and as a needed improvement in other questions. This suggests that additional Pickleball courts should be studied.

Q5 - What indoor amenities, services, or spaces do you utilize the most, and the least?

- 1. It is difficult to draw meaningful conclusions from this question. Over half of the listed responses did not adequately record whether it was responding to “most” or “least”.
- 2. Given the data we have, the Fitness Center was mentioned as the most used indoor amenity.
- 3. The Auditorium and Ball Room were both highly ranked, indicating a desire for events and programming.
- 4. There were only a few responses for “least used,” and no individual indoor amenity stands out as being particularly unpopular or unused.

Q6 - What recreational amenities are not here that you wish were here?

- 1. The three highest ranked items are walking infrastructure, children's playground, and dog park.

2. The second group of items that are the most desired are outdoor performance space, outdoor fitness equipment, and bike paths.
3. Physical Recommendations for recreational amenities should focus on reinforcing the future goals of Leisure World. Recommendations should consider amenities that may exist outside the gate.

Q7 - How important is golf for you?

1. The golf course is very important to the community.
2. An equal number of people reported valuing the golf course for golfing versus as a walking space and visual amenity.
3. It should be noted that the golf community encouraged golfers to participate in the Town Hall meeting.
4. Recommendations should seek to appropriately emphasize the course as a shared amenity while reducing conflict between golfers and walkers.

Q8 - What is your biggest transportation concern?

1. The biggest transportation concern is the operation of the shuttle bus.
2. The second greatest concerns include:
 - a. Pedestrian safety (Crosswalk safety and accessibility),
 - b. Norbeck Gate
 - c. Parking (Insufficient outdoor pool, golf cart, and clubhouse parking)
3. Operation of the shuttle system is outside the purview of recommendations for Trust properties but should be noted for Management.

Q9 - What are the most and least convenient ways to travel across Leisure World?

1. Walking is the most convenient way to travel across Leisure World, although improvements could be made to improve convenience.
2. Driving is the second most convenient way to travel across Leisure World.
3. Bike and Shuttle were both listed as the third most convenient option; however many people also listed the Shuttle as least convenient.
4. Residents appear to prefer to travel by their own means rather than using the shuttle service.

Q10 - Are there areas of the campus that you feel are unsafe or difficult to access for travel?

1. Most safety concerns are related to insufficient accessibility accommodation.
2. The second highest safety concerns are related to pedestrian crossings.
3. Additional safety concerns include:
 - a. Norbeck entrance
 - b. Lighting
 - c. Metrobus coming inside the gate
 - d. Vehicle Conflicts at Shopping Center Access

Q11 - Do you believe the monthly fees at Leisure World are consistent with the level of services, amenities, and other offerings of the community?

1. Most residents (57%) feel that the monthly fees are consistent (or low) compared with the level of services, amenities, and other offerings of the community.
2. There were a significant number of comments stating that greater transparency about fees and the budget is needed.
3. Ideas related to the trust properties include the following:
 - a. Facility-use membership for outside users
 - b. A tiered trust fee (Golf, Pool, Transportation, etc.)
 - c. Pay only for what you use.

Q12 - If land were available, what types of additional housing would you like to see at Leisure World?

1. 81% of residents were interested in new development of some type.
2. The residents are very interested in guest housing or a hotel inside the property (35%)
3. 46% of residents express an interest in a variety of different types of housing:
 - a. Single Family (35%)
 - b. More of unspecified type (17%)
 - c. Mixed use (18%)
 - d. Assisted living (12%)
 - e. High-rise (12%)
 - f. Condo (6%)
4. 19% of residents were not interested in any additional housing.

What are your Top Priorities?

Responses were grouped according to the broad categories listed below:

1. Green Space (x6)
2. Golf Course (x4)
3. Golf Course for Other Uses (x2)
4. Outdoor Amenities (x5)
5. Pedestrian Safety & Accessibility (x5)
6. Sustainability (x5)
7. Governance (x4)
8. Transportation & Connectivity (x3)
9. Pedestrian and Bicycle Safety (x3)
10. New Development of Housing (x3)
11. No New Development (x2)
12. Indoor Amenities(x2)
13. Maintain and Reinforce Focus on Active Adult (x2)
14. Other – N/A
 - a. Parking for Residents (N/A to Trust Properties)
 - b. Concerned about Increased Cost of Living

Given these responses, we can reasonably conclude the following:

1. About 60% of answers prioritized green space, golf, outdoor amenities, sustainability, and pedestrian and bicycle safety and accessibility. This suggests that respondents view outdoor activities, active living, and landscape in which these activities take place are the most valuable resources at Leisure World.

2. The golf course was listed as an important amenity, but respondents were split on its value only as a golf course or for other uses.

Town Hall 1: Intake Analysis

TORTI GALLAS + PARTNERS

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WHY DO YOU CHOOSE TO LIVE AT LEISURE WORLD?	
CATEGORY	
AFFORDABILITY	
A different state that is more affordable for retirees.	
Affordability	
Affordable	
Affordable – spouse likes.	
Cost effective real estate.	
Economics	
Liked house, good value for what you get.	
Price is good.	
Variety of Memberships	
AMENITIES	
Activities – amenities	
Always things to discover here (nice),	
Beauty	
Children in area	
Convenience - Medstar	
Ease of living	
Elevator	
Golf	
Golf course	
Love physical aspects.	
Mass transit +/- safety	
Medical Center	
No external main facilities	
Pickle-Ball	
Pool	
Shuttle bus	
Spiritual options	
Town like feeling.	
Transportation	
Walkability	
Walkable, accessible, clubs	
Wildlife	
Woodshop	
LOCATION	
Accessibility	
Center location	
Convenience	
Ease	
Family	
Family already live here.	
Location	
Location close to the city	
Location DC / Rds. Parks	
Near grandchildren	
Proximity to DC	
Proximity to family / moving to be closer to parents.	
SECURITY	
Asbury - Quaker	
Internal police force	
Safety – Security	
Safety (Gated community)	
Security	
SENSE OF COMMUNITY	
“Seeing is believing”	
3rd generation Family	
A different retirement community	
Alternate communities:	
Attracts new people.	
Diversity	
Ethnicity	
Friends	
Grandkids can come in.	
Knew people here.	
Lapidary – Gem mineral Club	
Move to large community to meet people.	
People, diversity, location, price (reasonable), amenities, sense of community / living and meeting likeminded people	
Safety – gated.	
Schoolmates	
Seek sense of community	
Social interaction	
NOT QUANTIFIABLE	
Riderwood (Continuing Care)	
OTHER	
Age in place	
Be mindful of future needs.	
Friends here when moved in	
Leisure World name and reputation	
Like options for purchase	
Riderwood is another good retirement community.	
Youthful independent living	

TABULATION	
CATEGORY	Count of ANSWER
AFFORDABILITY	11
AMENITIES	24
LOCATION	13
OTHER	7
SECURITY	7
SENSE OF COMMUNITY	19
Grand Total	81

Count of ANSWER

WHY DO YOU CHOOSE TO LIVE AT LEISURE WORLD?

CATEGORY	Percentage
AFFORDABILITY	9%
AMENITIES	30%
LOCATION	16%
OTHER	9%
SECURITY	13%
SENSE OF COMMUNITY	23%

NOT TABULATED
NOT QUANTIFIABLE
Riderwood (Continuing Care)
OTHER
Age in place
Be mindful of future needs.
Friends here when moved in
Leisure World name and reputation
Like options for purchase
Riderwood is another good retirement community.
Youthful independent living

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WHAT DO YOU LIKE THE MOST?	
CATEGORIES	
INDOOR AMENITIES	
Active Lifestyle. Clubs	
Amenities	
Amenities - ease of living	
Fitness Center.	
Health club	
Indoor pool	
On site restaurant	
Pool area, indoor	
Swimming Pools	
Variety of activities + clubs	
OTHERS	
Ability to live independently.	
Everything geared for this age.	
Like it all	
Location	
Well planned community	
OUTDOOR AMENITIES	
Able to walk - trails.	
Beautiful grounds	
Ease of walking to activities and friends.	
Friendly, easy to meet, walking paths, Golf course, and green space.	
Golf	
Golf community	
Landscaping	
Landscaping green areas	
Living in a park	
Open Space (Nature)	
Outdoor grills	
Outdoor pools important. Outdoor pool wonderful community opportunity to meet people.	
outside pool, golf course.	
Pickleball, golf, swimming	
Picnic tables	
Trees - Shade	
Walkable.	
pool / fitness center / golf	
SAFETY	
Safe environment, quiet.	
Safety	
Security	
security, being able to walk everywhere and feeling safe.	
SENSE OF COMMUNITY	
Active community	
Don't feel isolated.	
Friendly people	
Friendly, diversity	
Friends, friendly people, responsible neighbors,	
People friendly	
Sense of community	
Sense of community.	
Similar age group	
SERVICES	
Continuing Education	
Shuttle bus	
Social Workers.	
SOCIAL ACTIVITIES	
Ballroom dancing	
Ceramic, movies.	
Clubs / movies / education / Activities	
Community, clubs / opportunities to stay active, the grounds,	
Love diversity of activities, need to be active as we get older to age in place.	
Readymade peer group	
Woodshop	
HOUSING MANAGEMENT COST	
Entry cost	
Housing management costs.	
PEACEFUL	
Quiet	
Sense of calm - escape from chaos	

TABULATION	
CATEGORIES	Count of ANSWER
OUTDOOR AMENITIES	18
INDOOR AMENITIES	10
SENSE OF COMMUNITY	9
SOCIAL ACTIVITIES	7
OTHERS	6
SAFETY	5
SERVICES	3
HOUSING MANAGEMENT COST	2
PEACEFUL	2
Grand Total	62

Count of ANSWER

WHAT DO YOU LIKE THE MOST?

CATEGORY	Percentage
OUTDOOR AMENITIES	29%
INDOOR AMENITIES	16%
SENSE OF COMMUNITY	15%
SOCIAL ACTIVITIES	11%
OTHERS	10%
SAFETY	8%
SERVICES	5%
HOUSING MANAGEMENT COST	3%
PEACEFUL	3%

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WHAT WOULD YOU LIKE TO SEE CHANGED/IMPROVED?	
CATEGORY	
CAPITAL IMPROVEMENT	
Clubhouse I needs work – temperature, not attractive, first impression of outside world (lobby looks bad)	
Improved mobility – accessibility.	
Increase size of the library	
Modernization of buildings	
More reserve investment	
More: Electric Charging	
Outside exercise course	
Pools – Both need work – indoor. Toilets too low	
Safety on Georgia Ave	
Shuffleboard – bring back.	
The indoor pool needs maintenance.	
Unsafe sidewalks – too close to streets	
Update technology	
Upgrade auditorium, seats, less steep slope.	
Upgrade CH2 – Auditorium	
Upgrade technology in conference rooms	
Walking is dangerous.	
ENVIRONMENTAL SUSTAINABILITY	
Add sustainable landscape in common areas, add more shade trees (fewer crape myrtle, more diversity)	
Alternative Energy (Solar, Thermal)	
Conservation of Growth, Soil, Water	
Expand number of garden plots.	
Getting rid of some grass + add meadow – native plants and natural elements for wildlife will lower landscape fees.	
Less investment on Beauty (More environmental)	
More EV Stations	
More: Planting trees	
Must consider cost savings + environmental impact of solar etc.	
Mutual 13 – Planting for many trees too close together crowding each other, not placed well. Amateurs locating trees.	
Need electric golf carts and a charging station	
Prepare LW for the effects of climate change.	
Solar Panels – Encourage Montgomery County	
Take care of other wildlife population	
GOVERNANCE STRUCTURE	
Central oversight of mutuals	
Commitment to implementation of plan	
Do we have enough in Trust reserves.	
Huge HOA fee increases.	
Maintain legacy and value.	
More democratic governance.	
Resident input in hiring Project Manager greener space.	
Smaller more compact governance	
MANAGEMENT	
All buildings and mutuals no smoking	
Better orientation to walking paths (In person)	
Clubhouse 2 – Improve options for light refreshments.	
Clubhouses Open Later	
Easier online reservation	
Least: Share facilities with other over 55 communities.	
Update time slots, it is often empty because people don’t use entire time slots. Want schedule enforcement.	
NEW AMENITIES	
Additional recreational facilities, Tennis, Pickle Ball.	
Bigger outdoor pool.	
Bike Lanes (At least at major intersections)	
Bike riding	
Biking Paths.	
Bring back a pharmacy / drug store	
Dog Park	
Electric charging stations.	
Expand transportation.	
Golf hours for walking too restrictive	
Jogging Trails	
Med Center more responsive emergency / urgent care	
More options for using the golf course.	
More personal storage space	
More pickleball use auditorium + ballroom.	
More: Meetings and recreational spaces	
More: Recordings, storages, infrastructure for clubs	
Open air amphitheater	
Outdoor workout amenities along trails	
Park – Sidewalk Shade	
Pet Walkways	
Reduce the golf course to 9 holes + turn into more walking paths.	
Restaurant, more choices – prices	
Restaurants: Fast food options. Option for cookies, fruit, or veggies?	
Restaurants: More vegetarian healthy options and more staff	

TABULATION	
CATEGORIES	Count of ANSWER
CAPITAL IMPROVEMENT	17
DEER MANAGEMENT	3
ENVIRONMENTAL SUSTAINABILTY	14
GOVERNANCE STRUCTURE	8
HOURS OF OPERATION	2
MAINTENANCE	8
MANAGEMENT	7
NEW AMENITIES	25
OTHER	11
SAFETY	2
SOCIAL	11
Grand Total	108

Count of ANSWER

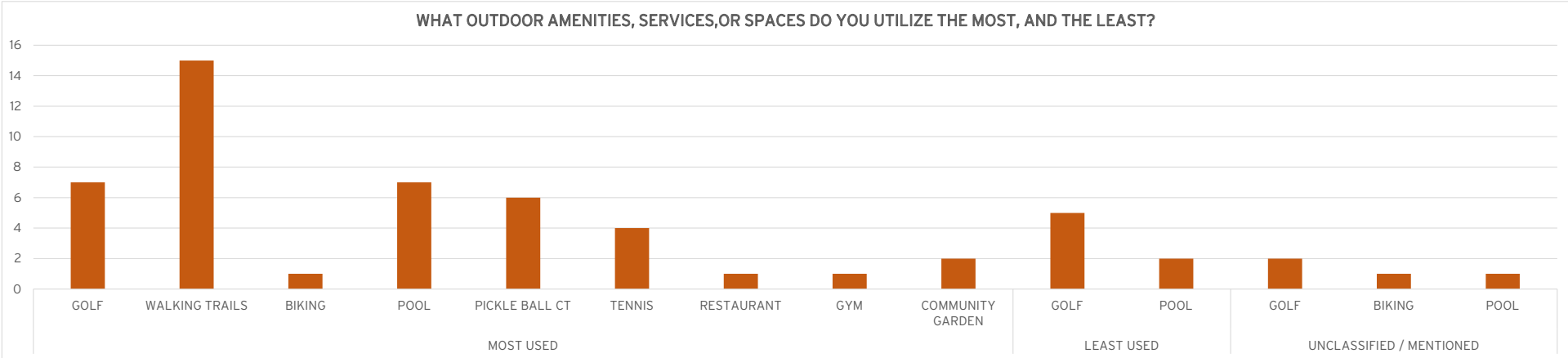
WHAT WOULD YOU LIKE TO SEE CHANGED/IMPROVED?

CATEGORY	Percentage
CAPITAL IMPROVEMENT	16%
DEER MANAGEMENT	3%
ENVIRONMENTAL SUSTAINABILITY	13%
GOVERNANCE STRUCTURE	7%
HOURS OF OPERATION	10%
MAINTENANCE	7%
MANAGEMENT	7%
NEW AMENITIES	23%
OTHER	10%
SAFETY	2%
SOCIAL	10%

CATEGORY
MAINTENANCE
Catch up on infrastructure repairs and upgrades.
Facilities Maintenance
Fix tennis and pickleball courts
Floating floor for ballroom dancing
Improve deck, outdoor areas, locker rooms are poor (not clean, updated.) Pandemic opened lanai, continue, nice (unique amenity.)
Maintenance – Drainage Grounds on Club houses.
Maintenance on homes / home renovation
This is an active retirement community that needs amenities to keep people active and keep facilities maintained in good condition.
SAFETY
Better transportation, safety on streets, open planning
Speed camera
SOCIAL
Facilitate more active community residents.
Introduction for new residents, website takes a long time
Lectures. Want to see a partnership with Montgomery College for classes.
More diverse courses
More outreach from clubs
More Veteran Park Events
Promote social activities for successful aging.
Recreation amenities and social activities to attract younger people (pickleball, etc.) tennis, lots of options to keep people active (trails, etc.) pool, gym, dancing, etc.
Virtual option for meetings
Workout classes
Zoom support for the clubs.
HOURS OF OPERATION
Increase restaurant hours (breakfast)
Restaurant Open Later
DEER MANAGEMENT
Animal Control – Eating Gardens.
Control deer population
Deer getting into parking garage.
OTHER
Better marketing
Classes are affordable, good instructors, seminars, CH restaurants, barille signs, pool, music, gym, better mics.
Could be friendlier with new people.
Feedback is shared but action items don't always come out of this / lack of action.
Future affordability, property values
Keep indoor gymnasium.
Least: Traffic noise from Georgia Av
Maintain image of Leisure World for future value to community.
OK status quo – wait and see
Parking – depending on where you live, visitors parking may or not be available.
Safety walk streets

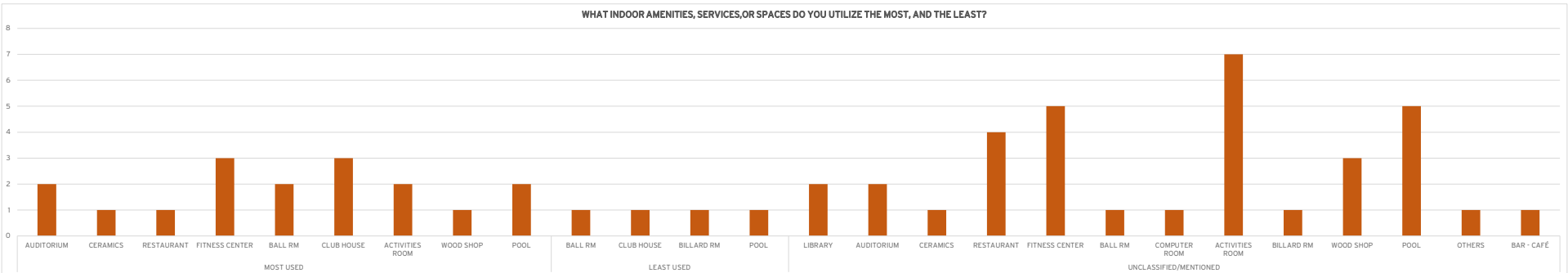
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WHAT OUTDOOR AMENITIES, SERVICES,OR SPACES DO YOU UTILIZE THE MOST, AND THE LEAST?													
MOST USED									LEAST USED		UNCLASSIFIED / MENTIONED		
GOLF	WALKING TRAILS	BIKING	POOL	PICKLE BALL CT	TENNIS	RESTAURANT	GYM	COMMUNITY GARDEN	GOLF	POOL	GOLF	BIKING	POOL
7	15	1	7	6	4	1	1	2	5	2	2	1	1



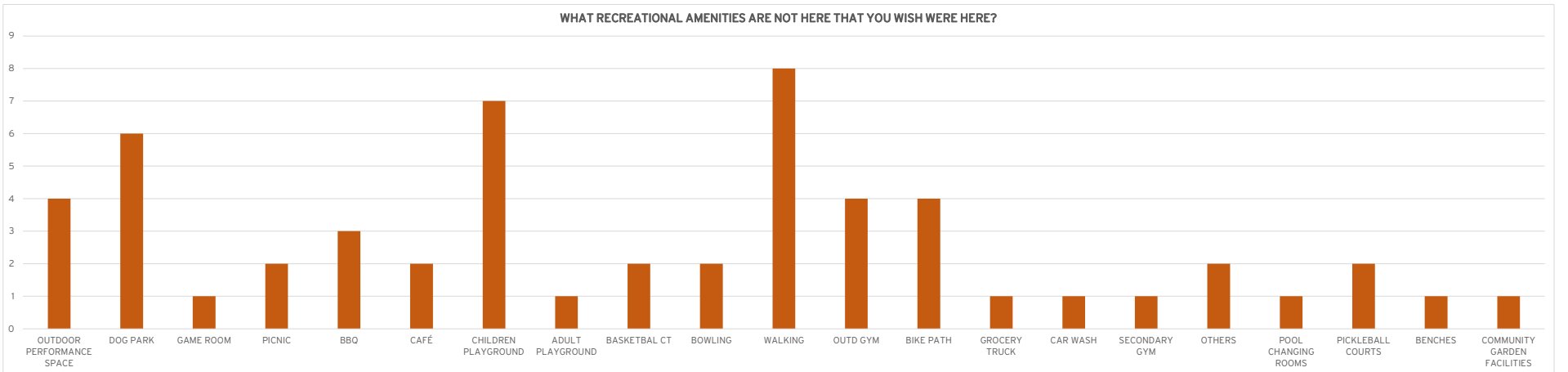
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WHAT INDOOR AMENITIES, SERVICES,OR SPACES DO YOU UTILIZE THE MOST, AND THE LEAST?																									
MOST USED									LEAST USED				UNCLASSIFIED/MENTIONED												
AUDITORIUM	CERAMICS	RESTAURANT	FITNESS CENTER	BALL RM	CLUB HOUSE	ACTIVITIES ROOM	WOOD SHOP	POOL	BALL RM	CLUB HOUSE	BILLARD RM	POOL	LIBRARY	AUDITORIUM	CERAMICS	RESTAURANT	FITNESS CENTER	BALL RM	COMPUTER ROOM	ACTIVITIES ROOM	BILLARD RM	WOOD SHOP	POOL	OTHERS	BAR - CAFÉ
2	1	1	3	2	3	2	1	2	1	1	1	1	2	2	1	4	5	1	1	7	1	3	5	1	1



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WHAT RECREATIONAL AMENITIES ARE NOT HERE THAT YOU WISH WERE HERE?																				
OUTDOOR PERFORMANCE SPACE	DOG PARK	GAME ROOM	PICNIC	BBO	CAFÉ	CHILDREN PLAYGROUND	ADULT PLAYGROUND	BASKETBAL CT	BOWLING	WALKING	OUTD GYM	BIKE PATH	GROCERY TRUCK	CAR WASH	SECONDARY GYM	OTHERS	POOL CHANGING ROOMS	PICKLEBALL COURTS	BENCHES	COMMUNITY GARDEN FACILITIES
4	6	1	2	3	2	7	1	2	2	8	4	4	1	1	1	2	1	2	1	1

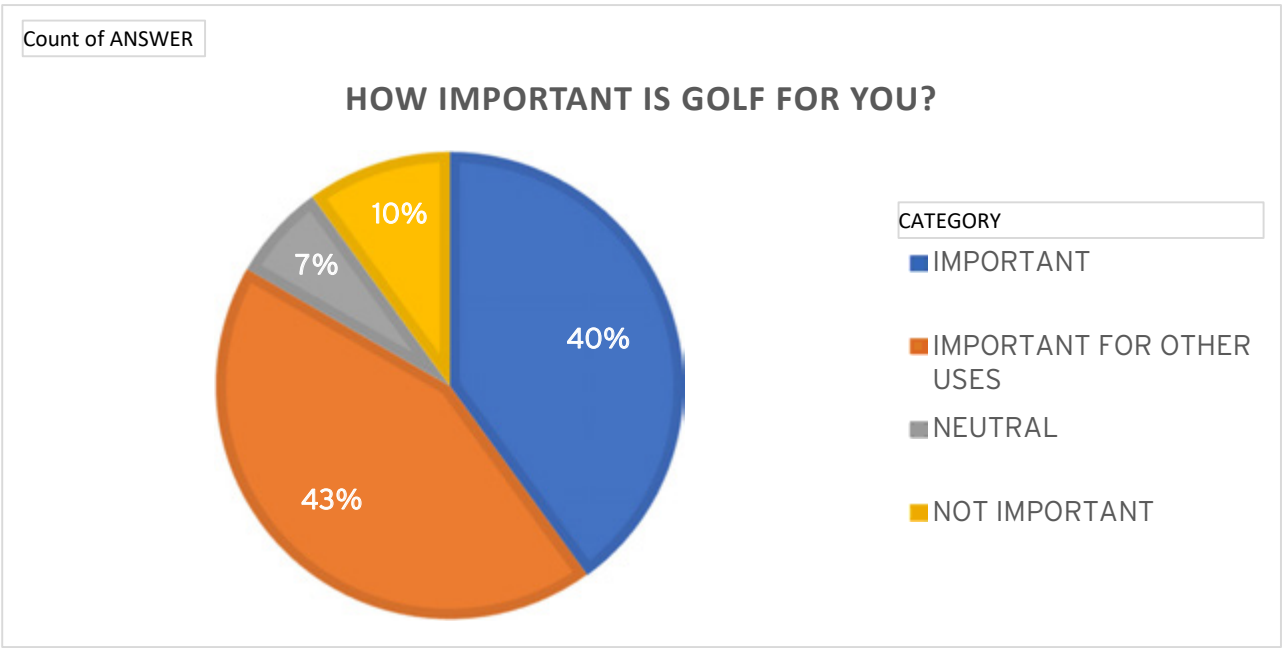


TORTI GALLAS + PARTNERS

Leisure World of Maryland
22450.LWP

HOW IMPORTANT IS GOLF FOR YOU?

TABULATION	
CATEGORY	Count of ANSWER
IMPORTANT	12
IMPORTANT FOR OTHER USES	13
NEUTRAL	2
NOT IMPORTANT	3
Grand Total	30

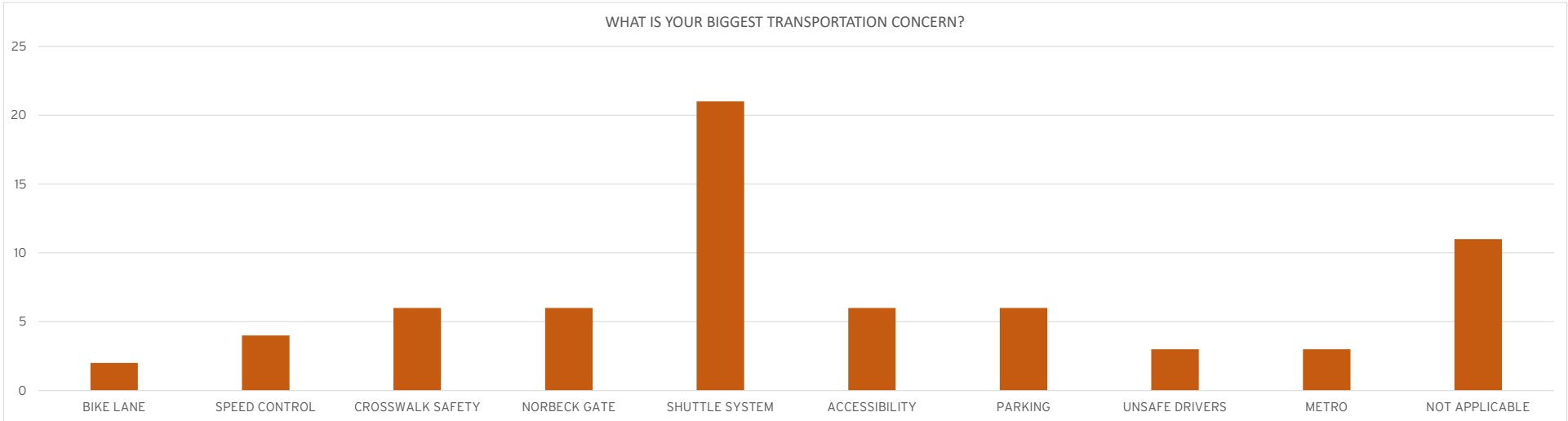


NOT QUANTIFIABLE
OTHER
Audubon certified.
Construct welcome center in lobby of Clubhouse I
Correct direction on golf course - some holes.
Golf members 3x per week
Green fee payers: \$24K
Wild-life management. Plant trees and wildlife

TORTI GALLAS + PARTNERS

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WHAT IS YOUR BIGGEST TRANSPORTATION CONCERN?									
BIKE LANE	SPEED CONTROL	CROSSWALK SAFETY	NORBECK GATE	SHUTTLE SYSTEM	ACCESSIBILITY	PARKING	UNSAFE DRIVERS	METRO	NOT APPLICABLE
2	4	6	6	21	6	6	3	3	11



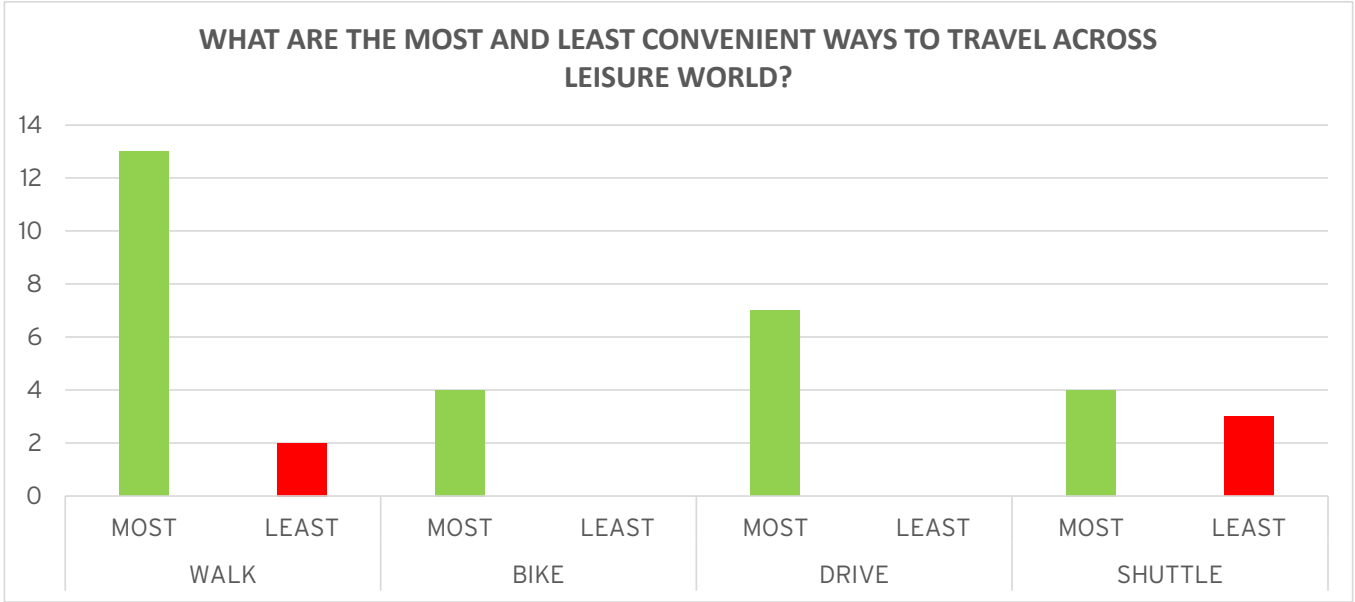
CATEGORY
NOT APPLICABLE
Better training for drivers for accessibility
Better ways to communicate info to residents. Want improved management/responsiveness to email and general feedback.
Deer in the roads
Driving services are too costly within LW.
Enough parking but needs more lights.
Make people aware LW police can write tickets.
Need better training.
Parking availability not much of an issue
Reckless drivers
Ride sharing set up among residents. Helper / task-rabbits, etc.
Train employees to work with seniors on health issues.

TORTI GALLAS + PARTNERS

Leisure World of Maryland
22450.LWP

WHAT ARE THE MOST AND LEAST CONVENIENT WAYS TO TRAVEL
ACROSS LEISURE WORLD?

WALK		BIKE		DRIVE		SHUTTLE	
MOST	LEAST	MOST	LEAST	MOST	LEAST	MOST	LEAST
13	2	4	0	7	0	4	3



WHAT WE HEARED
GENERAL COMMENT
By Turnberry the sidewalk ends
Clubhouse 2 access from trail.
Need more lighting (Entrance to CH2).
Need shuttle service during construction.

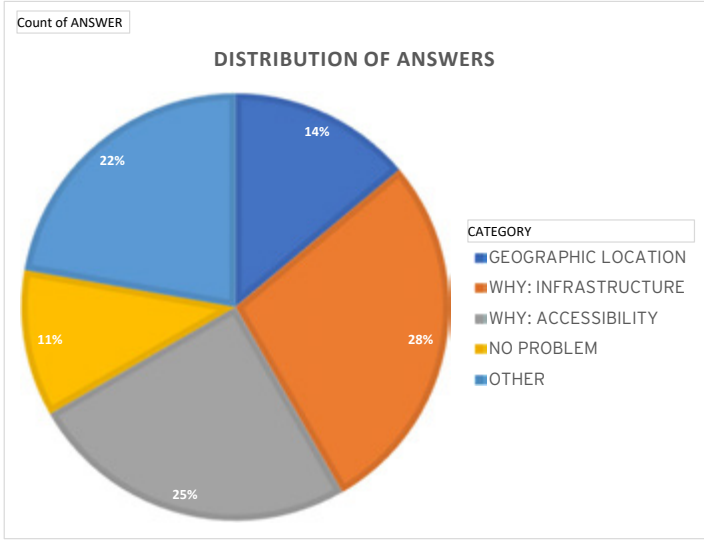
TORTI GALLAS + PARTNERS

Leisure World of Maryland
22450.LWP

ARE THERE AREAS OF THE CAMPUS THAT YOU FEEL ARE UNSAFE OR DIFFICULT TO ACCESS FOR TRAVEL?

CATEGORY
GEOGRAPHIC LOCATION
Cross Traffic. Open another entrance at grocery store to the shop court.
Norbeck
Norbeck entrance needs a second lane.
Norbeck entrance needs easier entrance.
The parking lot in shopping center is very busy - additional access through Bedford Court.
WHY: INFRASTRUCTURE
Bus stop in Chiswick must cross street, there is no crosswalk.
By Fairways South not easy to cross N. LW Blvd (going south)
It isn't clear where to expect people walking.
Light at main gate
Need brighter lights at crosswalk.
Need more crosswalks maybe solar button activated blinkers for crossing?
Not enough crosswalks. Cars don't always stop.
Not enough Parking and not safe
Some areas were not well lit.
There are places where people want to cross but there is no sidewalk (marked on map)
WHY: ACCESSIBILITY
Better transportation for disabled.
Crossing streets. Walking on sidewalks that are not ADA compliant.
Is community ADA compliance?
Lacking ADA ramps on sidewalk
Make sure new buses accommodate walkers.
Meet with handicapped or mobility issues about safety.
More handicap spaces parking garage
Ramps not great for people with mobility issues / not ADA compliant, sidewalks sometimes need better maintenance.
Unsafe or difficult travel: Yes. Not designed for low mobility
NO PROBLEM
Generally feel safe getting around
People generally feel safe.
We feel safe.
OTHER
Better quality construction is needed.
Golf course - put nets in some holes may be unsafe.
No security in parking garages or doors from garage.
Public bus: Security issues
Shuttle bus to upgrade technology to show schedule and location
Some of the housing was not built well, need lots of repair and resources (monthly fees to repair them.)
The public bus comes to clubhouse I. Anyone can get off. Security issue.
Want a shuttle to take them to other destinations like Montgomery Mall, downtown DC.

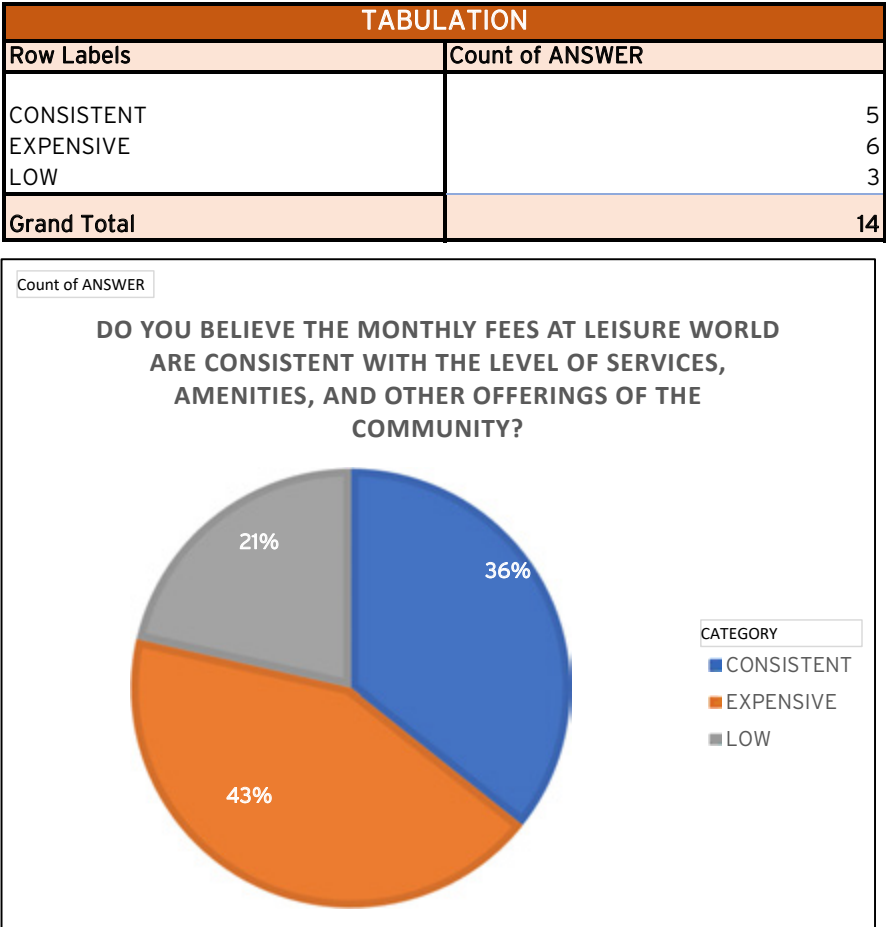
TABULATION	
CATEGORIES	Count of ANSWER
GEOGRAPHIC LOCATION	5
WHY: INFRASTRUCTURE	10
WHY: ACCESSIBILITY	9
NO PROBLEM	4
OTHER	8
Grand Total	36



TORTI GALLAS + PARTNERS
Leisure World of Maryland
22450.LWP

DO YOU BELIEVE THE MONTHLY FEES AT LEISURE WORLD ARE CONSISTENT WITH THE LEVEL OF SERVICES, AMENITIES, AND OTHER OFFERINGS OF THE COMMUNITY?

CATEGORY
IDEAS
Aging buildings need maintenance. Need to raise salaries.
Any such thing as a facility membership for outsiders to use?
Consider trust fee be tierd for: Golf, Pool, Transportation
Distribution between LW fees - mutuals
Fees for mutual amenities should include more amenities like checking on stove, dryer.
Grant opportunities
Need subsidy housing?
Reserve funds for maintenance have not been kept up.
Suggest shared services would be more effective and efficient.
ADDITIONAL COMMENTS
Heavy management
Insurance
Maintain beautiful green spaces, including replanting golf course and open spaces. This makes Leisure World unique and desirable.
Need streamlines way to pay dues (Problems with accounting department)
Not a helpful question given the lack of planning in the past and now need to make up for it while reserve increases.
Protect older residents from steep rises in fees.
Why do we pay of maintenance of things we don't use - golf course.

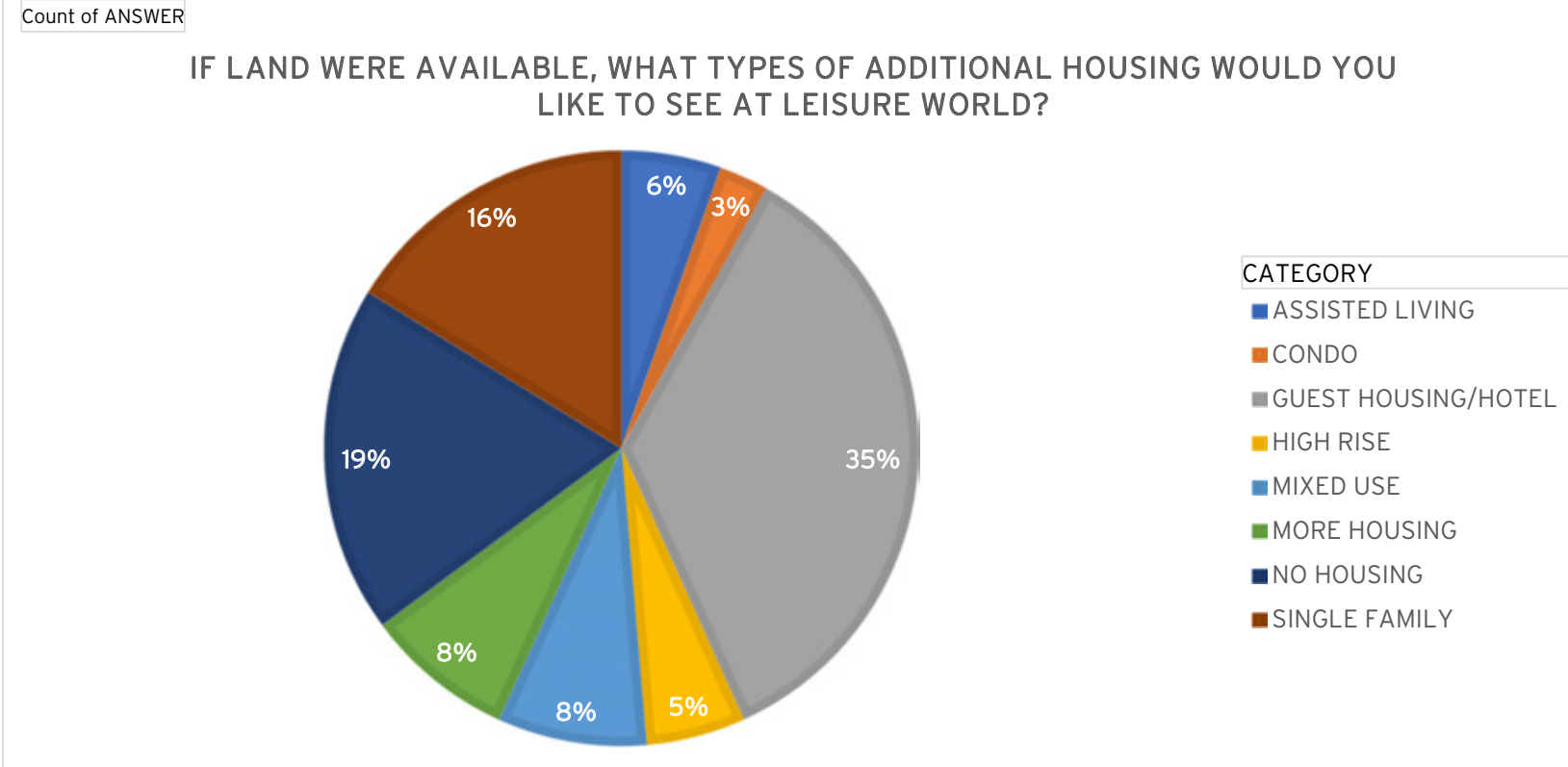


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Leisure World of Maryland
22450.LWP

IF LAND WERE AVAILABLE, WHAT TYPES OF ADDITIONAL HOUSING WOULD YOU LIKE TO SEE AT LEISURE WORLD?

CATEGORY
OTHER
Additional property acquisition to expand.
Combine facilities
Is the average age of residents going up or down? Might inform future needs.
Love ambiance of living here
More and better transportation
New Housing availability but not like Riderwood, more like Bedford court which is a separate entity.
We don't want continuing care to predominate + assisting living.

TABULATION	
CATEGORY	Count of ANSWER
ASSISTED LIVING	2
CONDO	1
GUEST HOUSING/HOTEL	13
HIGH RISE	2
MIXED USE	3
MORE HOUSING	3
NO HOUSING	7
SINGLE FAMILY	6
Grand Total	37



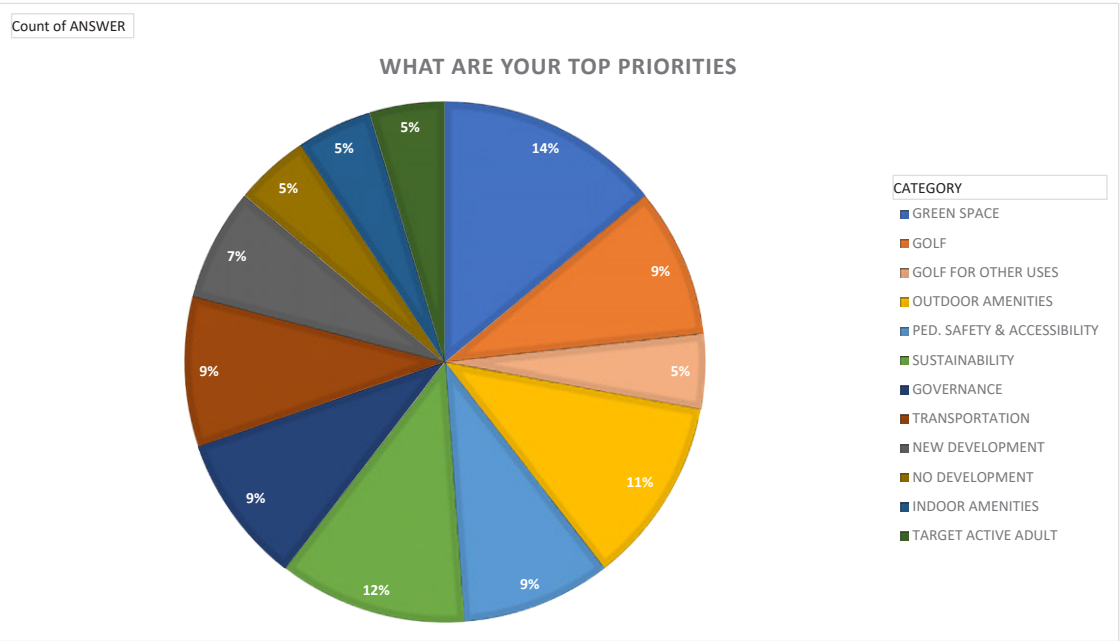
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WHAT ARE YOUR TOP PRIORITIES?

CATEGORY
GREEN SPACE
Green Space
Preserve Trees and Landscape
Maintain green spaces
Natural Landscape
Preserve and Add Green Space
No additional housing, keep green space
GOLF
Golf Course
Golf
Golf Course
Golf course.
GOLF FOR OTHER USES
Golf Course for Playing, Walking, and Green Space
Reduce Golf Course (more recreation for more residents)
SUSTAINABILITY
EV Charging
Green electricity
Environmentally Conscious
Solar
Electrical Grid Maintenance
OUTDOOR AMENITIES
Dog Park
Improve Outdoor Facilities
Pickleball
Keep amenities updated and competitive
Wide Range of Amenities
GOVERNANCE
Leadership and Governance
Succession Planning
Financial Transparency
Increase reserve funds
NEW DEVELOPMENT
Use Land for New Housing
Assisted Living Facility
Increasing Building Development
INDOOR AMENITIES
Wide Range of Amenities
Space and Support for Clubs
TARGET ACTIVE ADULT
Modern and Active 55+ (not continuing care)
Emphasis on being an active adult community and amenities and programming reflecting that
NO DEVELOPMENT
No additional housing, keep green space
No more housing
TRANSPORTATION
Transportation for Limited Mobility
More and better transportation
Connectivity
Norbeck Gate
PED. SAFETY & ACCESSIBILITY
Bike Lanes
Pedestrian and Bike Safety
cross walks, pedestrian safety
Accessibility

TABULATION	
CATEGORIES	Count of ANSWER
GREEN SPACE	6
GOLF	4
GOLF FOR OTHER USES	2
OUTDOOR AMENITIES	5
PED. SAFETY & ACCESSIBILITY	4
SUSTAINABILITY	5
GOVERNANCE	4
TRANSPORTATION	4
NEW DEVELOPMENT	3
NO DEVELOPMENT	2
INDOOR AMENITIES	2
TARGET ACTIVE ADULT	2
Grand Total	43



Board of Directors Work Session: Summary and Themes

Leisure World Master Plan: Board Work Session

Summary and Common Themes

We met with the Leisure World Board in a special work session to gather input and refine goals for the master plan. Following a brief introduction and overview of the master plan process, the Board President called on members one-at-a-time to respond to a series of questions that had been distributed prior to the meeting. These were:

The Strengths and Vulnerabilities of Leisure World Today

- What are the existing strengths and/or assets of Leisure World that need to be strengthened, protected, and leveraged?
- What are the Greatest Weaknesses in Leisure World that should be Addressed through this Process?

The Opportunities and Challenges for Leisure World in the Future

- What do you see as the greatest opportunities for change, or additions, to ensure a vibrant community and an economically sustainable future?
- What are the greatest threats to the long-term viability of Leisure World's as an active-adult community?

Board members presented their answers, although some declined to answer. Some members also followed up with an email of their responses.

Following the work session, board comments were reviewed and sorted into categories. An overview of the discussion and emerging themes is below.

Strengths

In general, there is broad consensus (by 2/3 of respondents) on the biggest strengths of Leisure World. The two most prevalent answers were regarding green space and social life. At the same time, the physical design of the community and the staff and tradespeople that maintain it are equally important. It was noted, however, that the buildings and infrastructure need maintenance to remain a strength, and that the pay and retention of tradespeople is an important part of that. Security was also listed as a strength.

Weaknesses

Current weaknesses at Leisure World can be categorized into three major areas of concern: IT and communications, marketing and image, and deterioration and repair of infrastructure.

IT and Communications: Comments relating to IT and communications represented almost one-third of the comments received. Comments in this category include a variety of related but distinct concerns. They are:

- A better web site is needed.
 - This includes both internal communications and external marketing.
 - An online payments portal is lacking and needed.
 - An online booking and reservation system for rooms is lacking and needed.
- Software and methods to improve internal communication are needed.
- Video conferencing and other A/V equipment in the clubhouses and meeting rooms is out of date.
- Collecting usage data on amenities and facilities is needed in order to make informed decisions.

Marketing and Image: Concerns relating to the marketing and image of Leisure World were the next most prevalent. Multiple board members made comments about the apparent disconnect between wanting to be an “active adult” community and some of the population that either currently lives at Leisure World or is moving in. It was suggested that Leisure World needs to do a better job marketing and communicating the aspirations of the community with potential residents. Educating Realtors to ensure Leisure World is accurately portrayed was specifically noted as important.

Infrastructure Repair and Maintenance: The final major area of concern is the condition and maintenance of infrastructure. There are general concerns about buildings showing their age and needing routine maintenance. In addition, several specific projects were mentioned, including street repair, replacing/adding missing sidewalks, and adding bike lanes. Multiple people mentioned concerns with provision of electrical service to meet future demands as electric vehicles become more prevalent. In addition, the desire to switch mutuals to individual metering was mentioned.

The remaining comments were split among a variety of topics, including resident attitudes, demographics, and employee retention.

Opportunities

Most of the opportunities identified had to do with improving how Leisure World functions, across a variety of areas. Functional opportunities can be described as relating to Technology and Utility Improvements, Governance, Increasing Revenue, and Marketing.

Technology and Utility Improvements: Improvements to the technology at Leisure World were identified by multiple people as a key opportunity to ensure Leisure World is ready for the future. The importance of an improved energy grid to accommodate electric vehicles and increased electrical demand in the future was identified. Individual metering was also mentioned as an important step in the process.

Governance: Several members of the board also suggested that it would be valuable to look at the governance structure to increase efficiency and make better decisions. Evaluating the structure and balance between Mutuals and Management was suggested as well.

Increasing Revenue: Several members noted the importance of finding new sources of revenue, or ways to increase revenue, as being necessary for the future success of Leisure World. There does not appear to be consensus on what those strategies may be. Possible suggestions include raising fees for the golf course, hosting a signature restaurant that would bring visitors from outside Leisure World, or developing assisted living facilities that would generate income.

Marketing: The last of the major opportunity categories revolved around marketing efforts. The need to focus efforts on attracting more “active adult” residents was restated, along with studying what would attract younger potential residents. Working with real estate agents to accurately convey community expectations was also mentioned.

Threats

There was a wide variety of input about threats to the future of Leisure World. The most discussed topic was reluctance to change and fear of change.

A subset of this discussion was about generational changes and maintaining the social and civic continuity of the community. Some board members expressed the idea that younger generations are not interested in living in a place like Leisure World. Many newer residents are also still working and have less time to volunteer or be a part of the community. Additionally, it was noted that younger generations have less money. Concerns about rising costs and high fees exacerbate this.

At the same time, as current residents age in place they may need additional services that increase costs to the community. Some members worry that younger generations will feel like that is a burden.

Additional threats were identified in two related categories: Vision and Perception. An inaccurate/negative perception of Leisure World was identified as a threat to its success; statements and jokes about “old people” and “seizure world” might be damaging. There is a disconnect between the desire to be an “active adult,” 55+ community and the reality of who lives here now. It was noted that homes sell very quickly, so there is some disagreement about how real the problem is.

Some board members questioned whether Leisure World still matched the founding vision. It was created at a different time with a different business model. It was suggested that leadership needs to evaluate what it wants to be and how to achieve that.

Common Themes and Takeaways

As we've heard in many conversations, people in Leisure World greatly value the community, layout, and green space. There is a distinct desire to protect and improve the quality of the open space and increase access to it with expanded active recreation facilities.

The facilities and buildings themselves are also valuable, but they need to be maintained, updated, and modernized as needed to continue to meet the needs of residents.

In addition to the physical design, social cohesion and civic involvement is also hailed as both a hallmark characteristic of Leisure World and one of its greatest strengths. This suggests a need to ensure there is continued adequate space for social gatherings and clubs, and to build the technology infrastructure necessary to enable better communication and organization.

Sustainability ran through many different discussions as a theme, including protecting the green space, caring for Bel Pre creek, ensuring the electrical system is prepped to handle electric cars, and studying individual metering to support the above and encourage conservation.

Another common thread that connected multiple conversations is how Leisure World is perceived and marketed to the surrounding community and potential residents. Whether or not they are fair – or even true – perceptions are real and should be taken seriously. Marketing, amenities offered, services, and decisions about priorities should all reinforce the underlying goals.

The last of the major takeaways is a need for further discussion and evaluation of governance, management, and the financial direction of the Trust and Mutuals.

Transcribed Notes

Board Intake Session, Feb. 16

The Strengths and Vulnerabilities of Leisure World Today

Q1: What are the existing strengths and/or assets of Leisure World that need to be strengthened, protected, and leverages?

- This plan is for 30 years out, we won't be here. Making plans for other people.
- Need to protect the financial situation for all.
- Positive aging and social connectivity (3)
- Physical Place and Aesthetics are a strength.
- Connections between people
- Canopy Trees are strength along with the environment.
 - Need arborist on staff.
- Make it more walkable, fill in missing sidewalks, and add bike paths.
- Lack of communication (is this a strength?)
 - Look toward future.
- 610 ac of green space
- 90 clubs, groups, and organizations
- Physical Properties Department and Plant
 - Need to strengthen – better pay, more tradespeople.
 - A big strength of the community is onsite trades.
- Security
- Commitment of Volunteers
 - Also, a vulnerability, as aging residents can take on less.
- Green Space
- Green Space
- Facilities
- Board is greatest strength.
- Aging infrastructure and buildings are weakness (2)
- Security
- Experience and education of residents is a strength. Depth and breadth
- Open Spaces
- Buildings need to be strengthened and protected.
- Lovely, Green Spaces
- The golf course needs to be maintained.
- Continually modernize amenities.
- Open Spaces, Visual

Q2: What are the Greatest Weaknesses in Leisure World that should be addressed through this process?

- Lack of marketing the community
 - More outside marketing is needed.
 - People don't see amenities, only see the gates.
- Deteriorating infrastructure and floodplain issues
- Image and marketing the expectations of the community.
- Web Site
 - Online reservations and payments
- Lack of knowledge of how facilities are utilized.
 - i.e. clubs, gym, shuttle,
 - need to collect usage data.
- Treatment of management, volunteers, and workers
 - Some residents are rude/abusive.
- Image
 - Misunderstanding. People move here expecting assisted living rather than AA.
- Identity Crisis – think focus is not on Active Adult
- IT needs updates
- Residents are vocal about things they don't like, but not constructive.
- Aging population
- Manage financial resources.
- Lack of marketing
- Aging infrastructure
- Disrespect for workers/employees.
- Web stie
- Employee retention, better pay
- IT
 - Online payments, automatic payments
 - Video meeting in CH2
- How people treat each other
- Tendency to jump on each other, assume worst.
- Need to get back to FEPII.
- Lack of accessible, universal system for communication
 - Different organizations and groups
 - IT, AV, etc.
- Marketing – 55+ AA does not match who lives here.
 - How to make it so?
- Electrical
 - No individual metering
 - Does not promote conservation.
- Need better documentation.
 - Look back to what has been done to plan for the future.

- Projects, decisions, rules, etc.
- Don't take care of NW Branch (Bel Pre Creek?)
- Infrastructure
 - South LW Blvd
 - missing lines and markings
 - streetlights out
 - dangerous road
 - small signs
- Communication between clubs and LW
- Aging infrastructure, buildings, and utilities
- New Technology
- Balance between "young-old" and "old-old" residents
- Transportation
- Image: Need to market as AA 55+
 - Need amenities to support AA 55+
- Keep things in good condition.
- The Physical Properties Department needs help and a raise.
- Balance resources and needs
- Marketing – people think its assisted living, aging in place.
- Getting things done. Takes a long time to start and finish projects.
 - Too many rules and regs
- Web site, online services, need to be improved.
- "Densification makes me shudder". Don't need more.

Q3: What do you see as the greatest opportunities for change, or additions, to ensure a vibrant community and an economically sustainable future?

- Opportunities are a response to weaknesses.
- Support what we have, don't need to add new things.
- Ways to increase revenue.
- Deliver services better.
- How can housing be regenerated?
- Add new housing?
- Market to 55+ AA
- Improve communications, both internal and external
- Things have improved, but don't rest on laurels. Keep going.
- Real estate agents: make sure they accurately communicate the expectations of the community. Educate real estate agents.
- Web stie
- Improve governance. Hard to get decisions made or take ion issues to improve things.
- Address financials of trust reserve and mutuals
- Governance
- Technology
- Ensure that voices are heard from potential residents.

- Market research for 40-55 yo
- Individual meters for electric
- Comment about LW being an Active Adult 55+ community:
 - “Am I supposed to leave? Where do I go?”
 - Add nursing services to support aging in place?
 - Can’t magically make it 55+ younger people. Ownership model conflicts with that.
 - Can’t make people leave.
- Communication with Real Estate agents
 - Rules and expectations
- Upgrade electrical service to handle future load.
 - More need for electric vehicle charging, etc.
- Improve cell service.
- Evaluate mission statement. Who are we?
- Revenue earning opportunities.
 - Rising costs need rising revenue.
- Adjustment of power between Management and Mutuals
 - More to Management
- How to deal with “dumping” parents?

Q4: What are the greatest threats to the long-term success of Leisure World as an active-adult community?

- Marketing / Mismarketing of the community
- Increasing costs
- Attitude
 - Mutuals are the heart of the community. Housing is where people live, not Trust property.
- Increase Revenue (not actually a comment about threats)
 - Destination restaurant? Bring in outside5rs?
 - Increase golf fees.
 - Build assisted housing to increase revenue.
- Changing demographics and desires
 - For example, 50-year-old son has no interest in living gat Leisure World or similar.
- Lack of vision and leadership
- Relationship between LWMC and Mutuals
- Rising costs
- Rising costs and condo fees
- People living here now.
 - Comment: this is the first board meeting they attended where people sat quietly and listened
 - Good employees leave due to treatment from residents.
- Negative perception: “old people”, “seizure world”
 - Yet, units sell quickly.

- Disagree with “age” discussion.
- Fear of spending money on improvements
- A willingness to consider and take on change. Fear of change
- Age and inactivity
 - Not in favor of “pushing out” older people.
 - Passon on roles form older seniors to younger seniors.
 - Homes sell quickly, is there actually a marketing problem?
- Participation (lack of) in LW community
- Lack of volunteerism in new residents
- The potential for rental housing is a threat.
- Marketed as 55+, average age is 75+
- Need better technology.
- Fear of spending on infrastructure, streets, and trust facilities
 - Will increase Trust Fee
- The new generation has less money.
- Reluctance to change.
- High cost of condo fees
- Electrical impact on Mutuals
- Leadership moves slow.
- Accepting change
- Younger people moving in are still working full-time. Can’t volunteer as much.
- The business model was set up for selling units. LW is no longer selling. Need a different model.
- Orientation for new residents

Q5: What seem to be the top two most pressing needs for Trust Properties, and why?

- Did not discuss during work session.

Leisure World Master Plan

Board of Directors Online Survey Summary

Following the Board of Directors special work session, board members were given the opportunity to give feedback and answer other questions in an online survey. Questions were organized into seven categories:

- General
- Indoor Amenities
- Outdoor Amenities
- Transportation
- Economic
- Residential
- Strategic Priorities

Twenty-six board members filled out the survey, although many questions were left blank: approximately ¼ of all questions. Where applicable, “no answer” or “I don’t know” responses have been noted in the charts below.

The first two questions were background information and have been omitted from the summary report.

Q1: What is your Name? (Optional)

Not included in summary report.

Q2: Which Mutual do you Represent?

Not included in summary report.

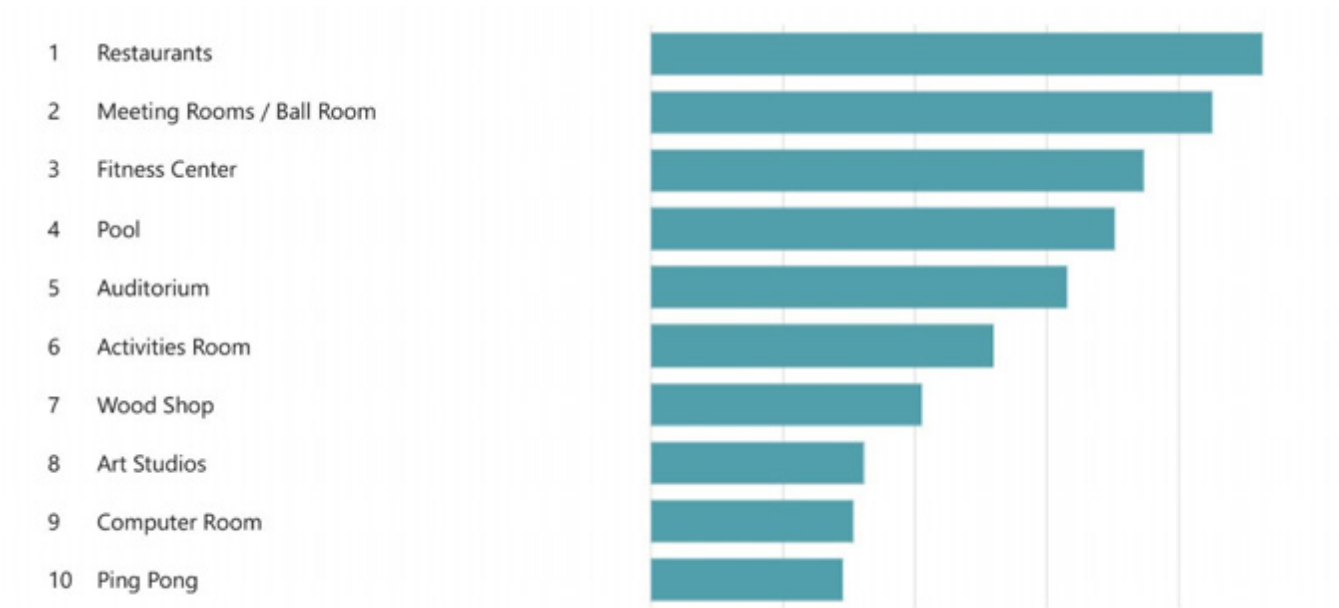
Q3: Did you attend the Town Hall Meeting?

Just over half the respondents attended the first Town Hall meeting.

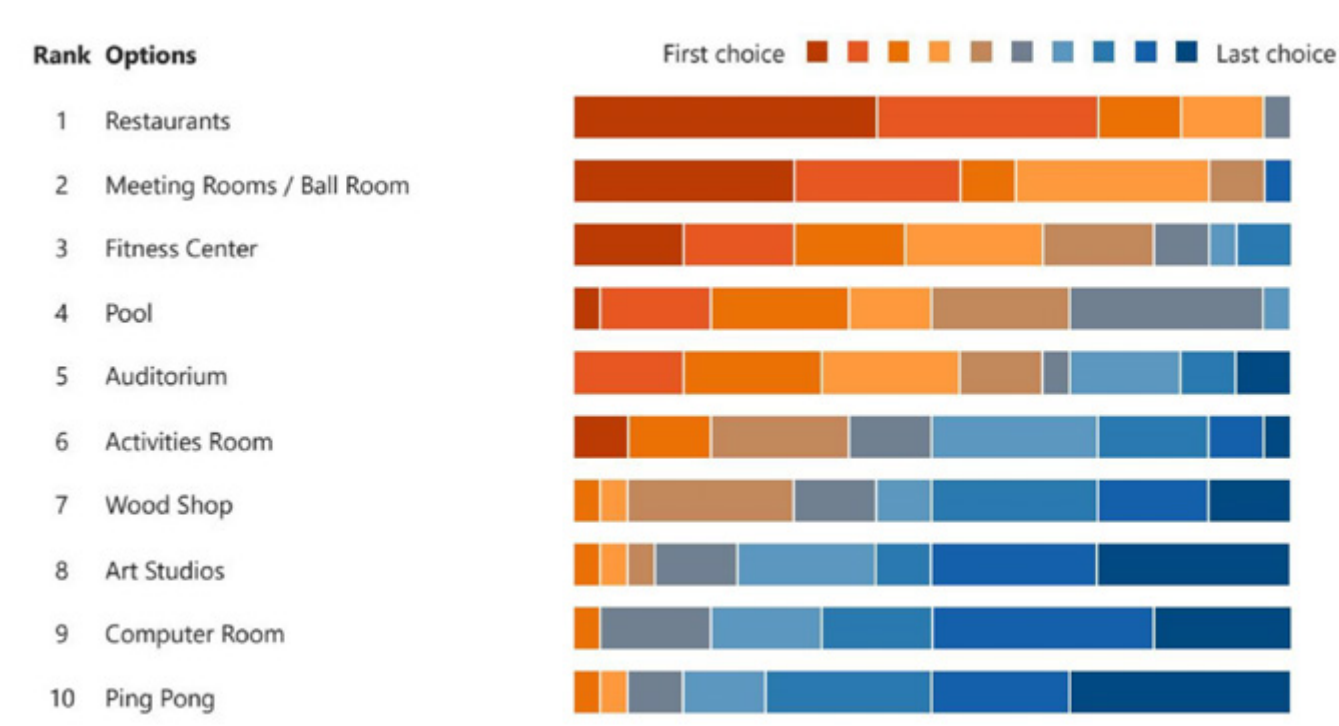


Q4: Which Indoor Amenities do you think are used the most?

Based on their perception of use, respondents were asked to rank a list of 10 indoor amenities from most to least used. The weighted ranking is listed below:

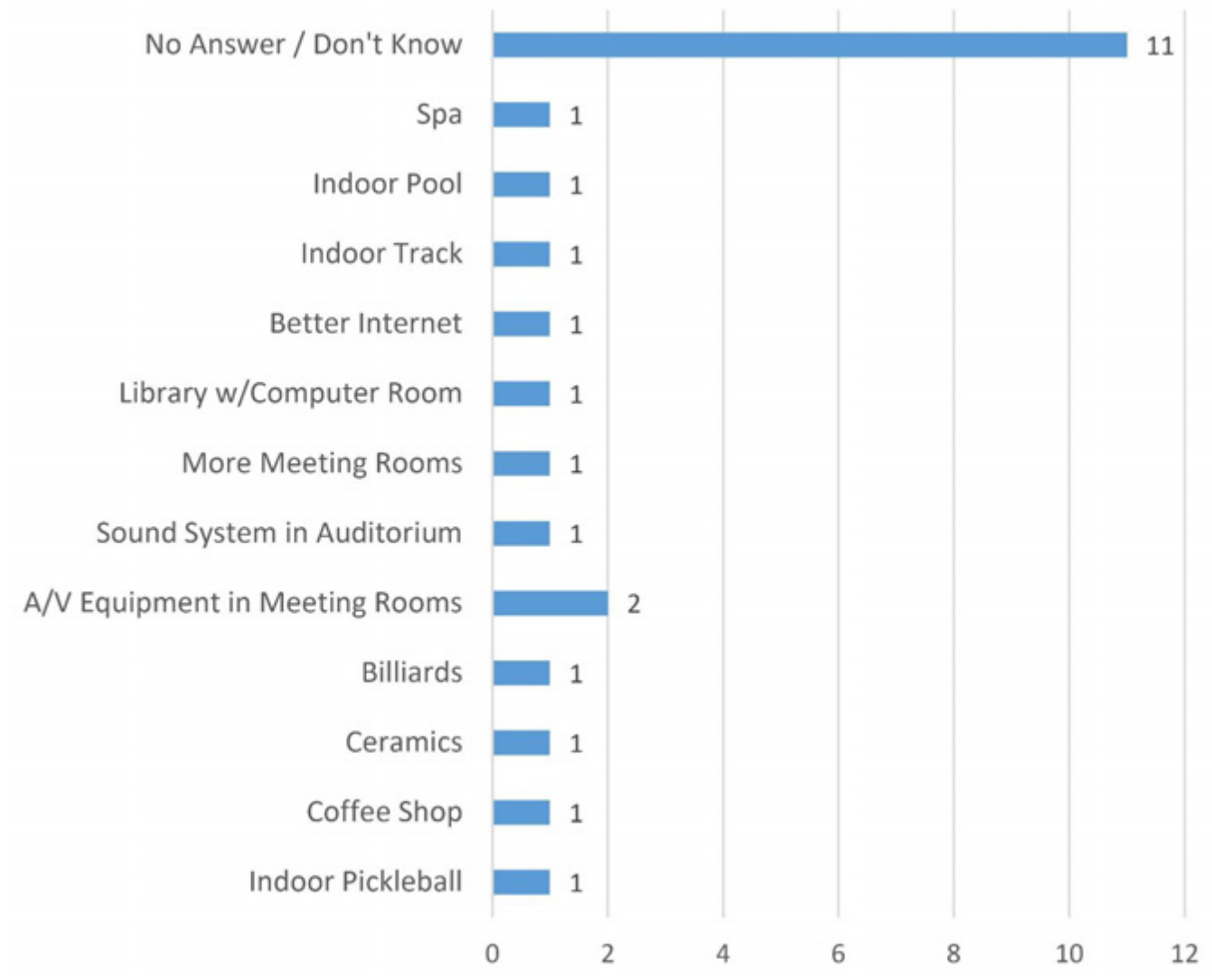


The summary rankings are weighted based on individual rankings from each respondent. Looking at the data in more detail, we can see that even though each amenity had a range of responses, clear patterns appear based on the number of people who consistently ranked them towards the top or bottom of the list. Added detail on the rankings is shown here:



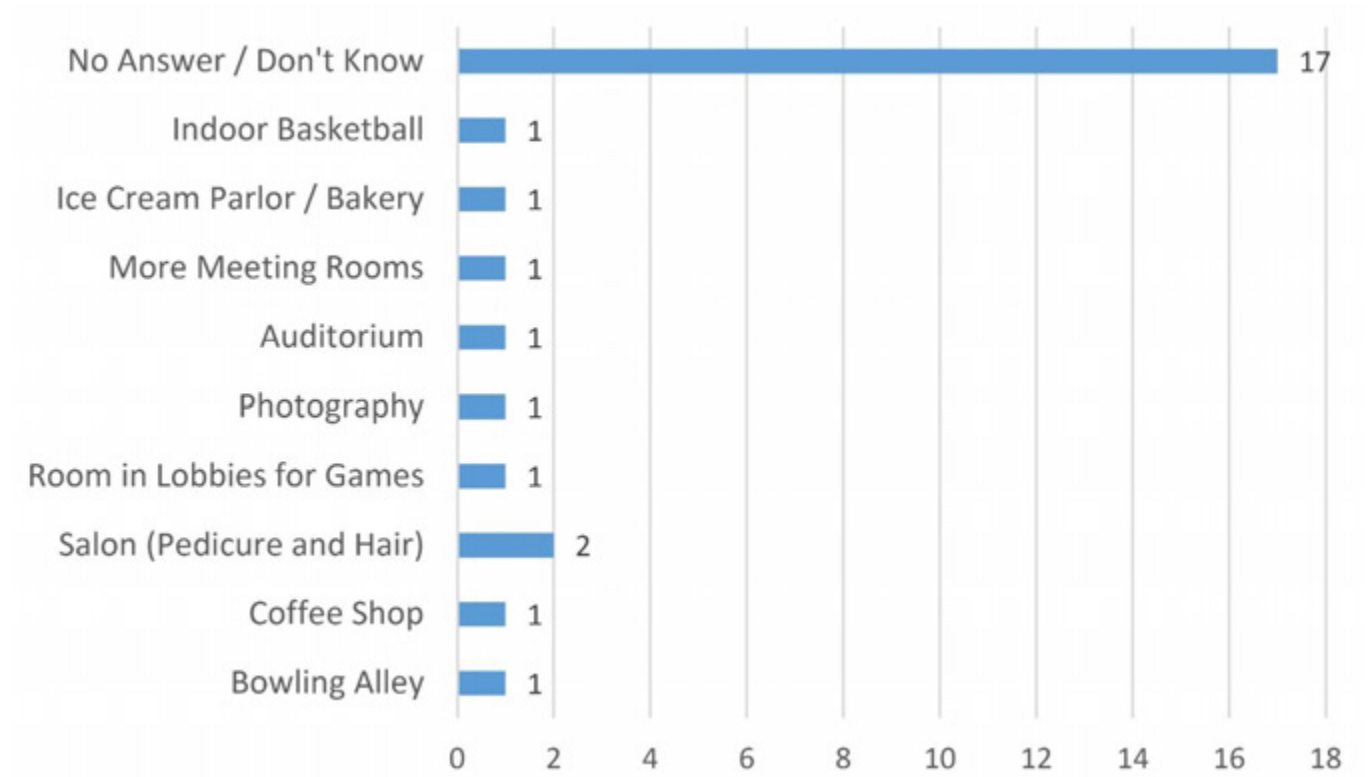
Q5: What Indoor Amenity is Missing the Most?

A variety of answers were given, without a clear affirmative consensus. Almost half of the responses were left blank or answered with “don’t know.” Audio/visual equipment in meetings rooms was the only specific item mentioned more than once.



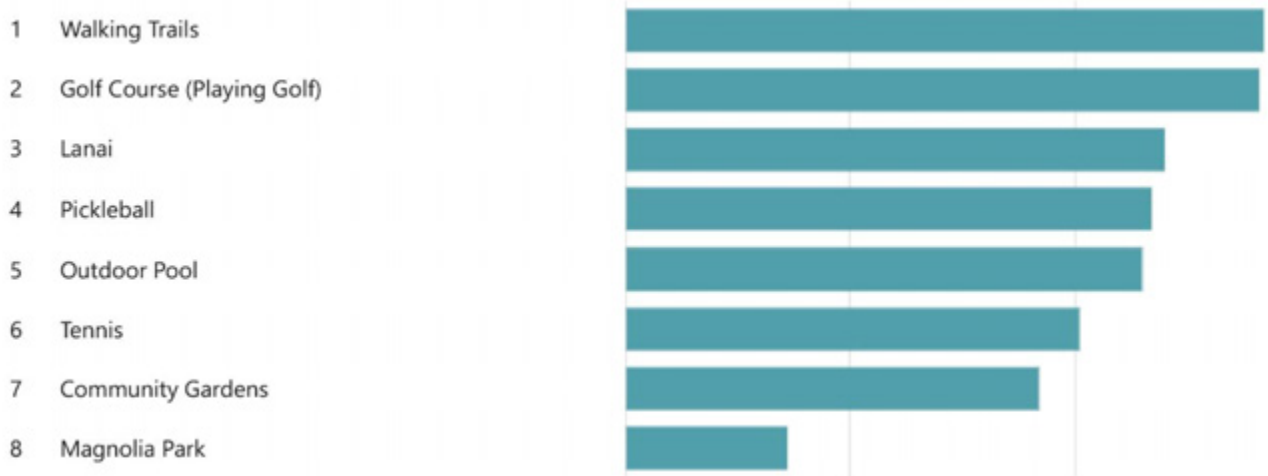
Q6: What Indoor Amenity is Missing the Second-Most?

Like question 5, no single specific response stood out, other than no answer/don't know.

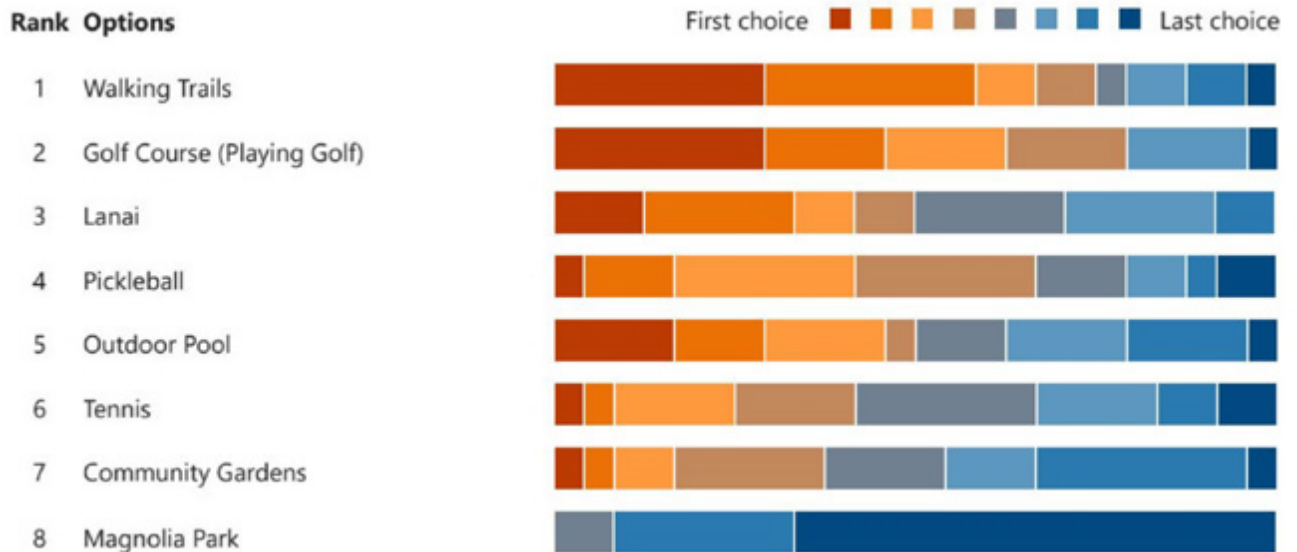


Q7: Which Outdoor Amenities do you think are used the most?

Based on their perception of use, respondents were asked to rank a list of outdoor amenities from most to least used. The weighted ranking is listed below:

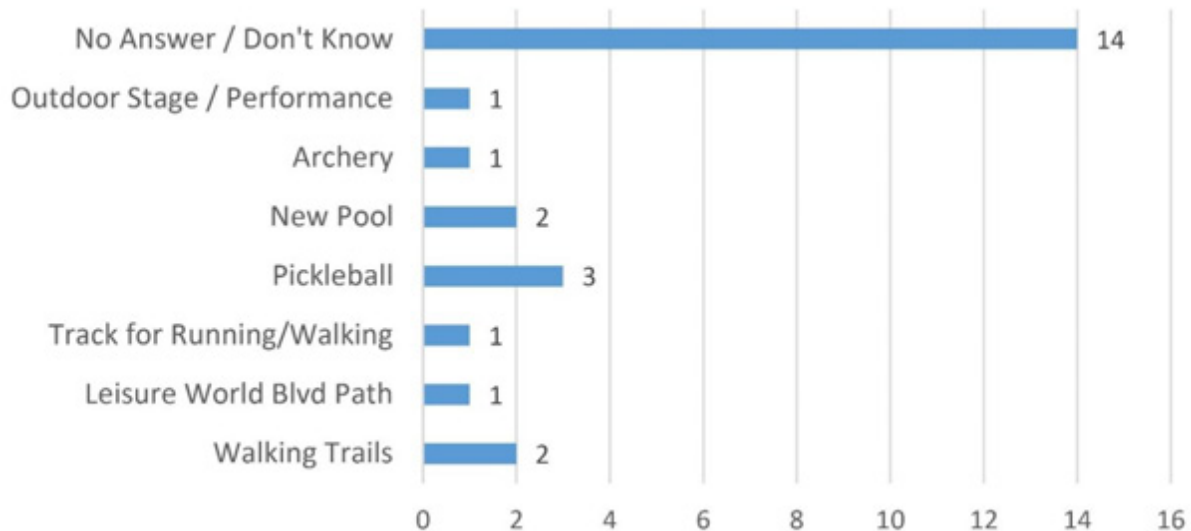


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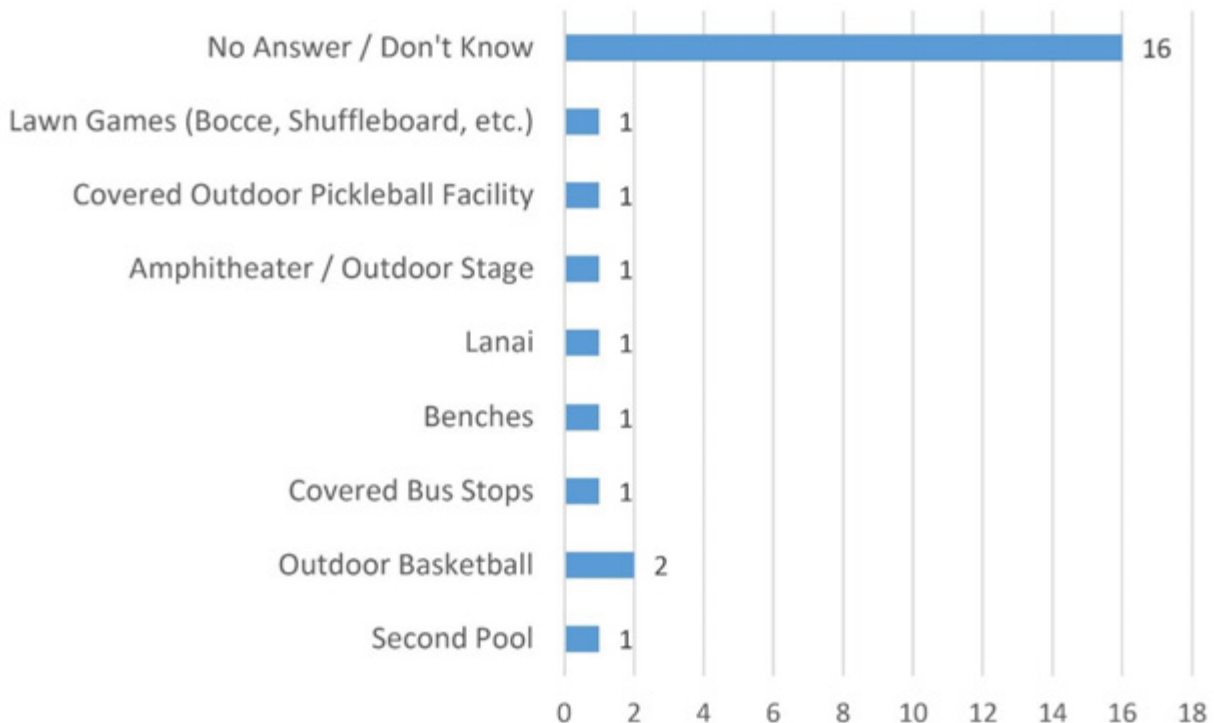
Q8: What Outdoor Amenity is Missing the Most?

Among specific amenities mentioned, pickleball was the most desired, with more walking trails and a new outdoor pool being second.



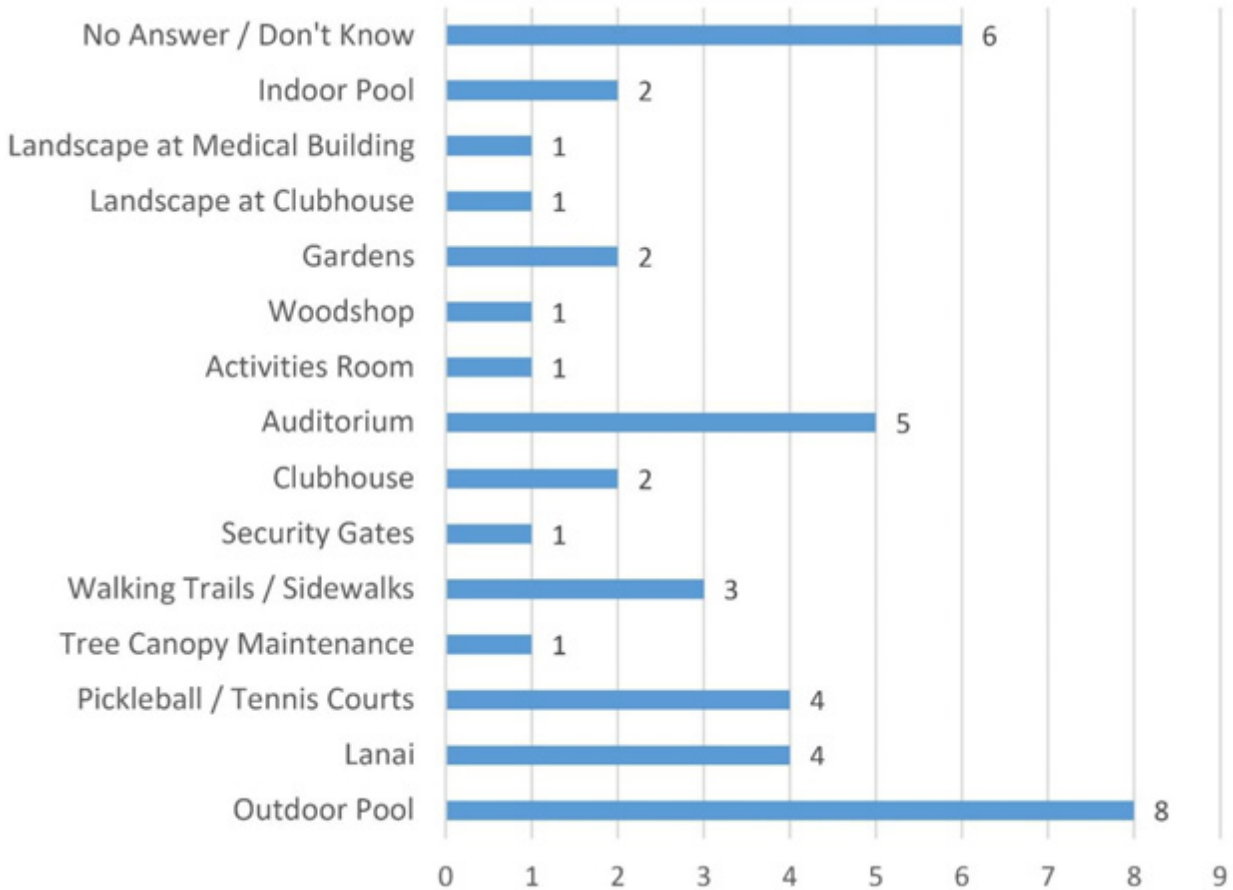
Q9: What Outdoor Amenity is Missing the Second-Most?

Although these were listed as respondents' second priority, some of the same amenities listed in Question 8 are repeated in the list below. Outdoor performance space, more pickleball courts (covered, specifically), and a new outdoor pool were mentioned again in this list. Outdoor basketball also had two mentions, suggesting there may be an opportunity for more active sports in the community.



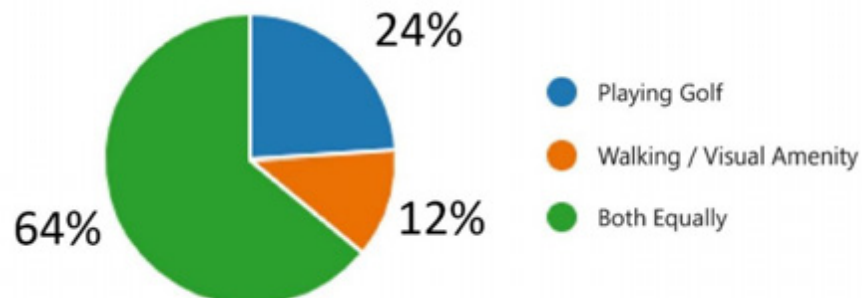
Q10: What Existing Amenity Areas Need Repair or Replacement?

The outdoor pool was clearly identified as most in need of repair/replacement with 8 responses (12 if the Lanai, mentioned separately, is included as being part of the outdoor pool). The Auditorium was also consistently mentioned, along with the Pickleball/Tennis Courts and trail/sidewalk maintenance. It is worth noting that this is the first question where “No Answer/Don’t Know” was not the majority response.



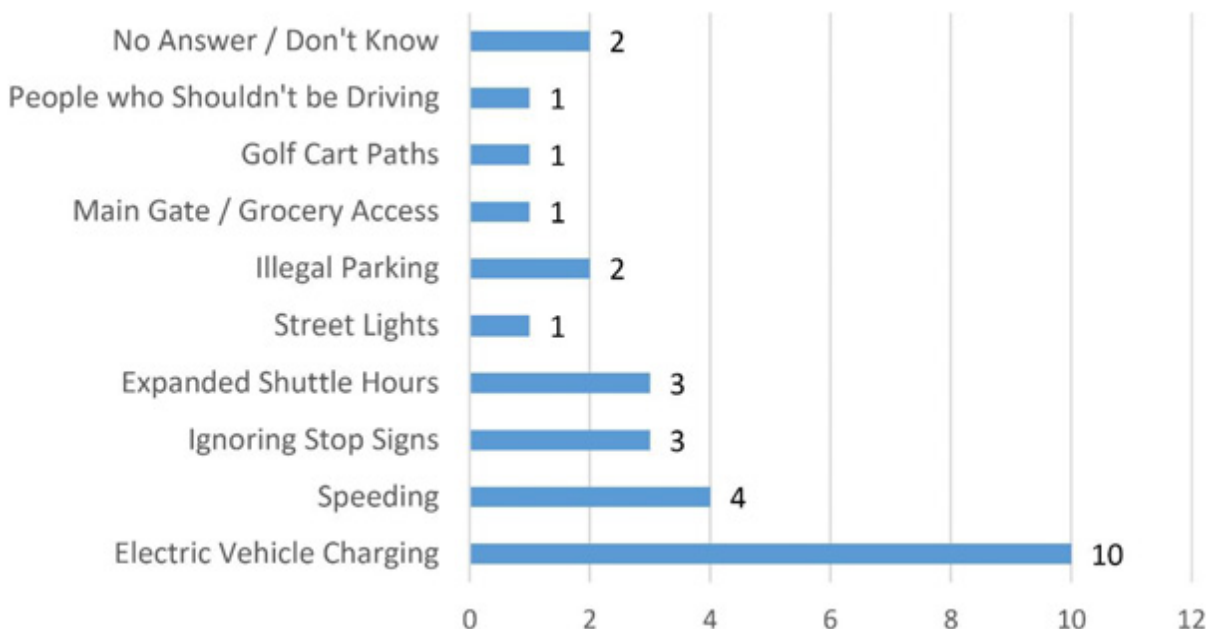
Q11: Is the Golf Course most important for Golfing, Walking/Visual Amenity, or Equally for Both?

Similar to feedback received in other venues, the golf course appears to be important to residents at Leisure World, even those who are not active golfers. 64% of respondents feel it is equally important for golfing as it is for walking and aesthetics.



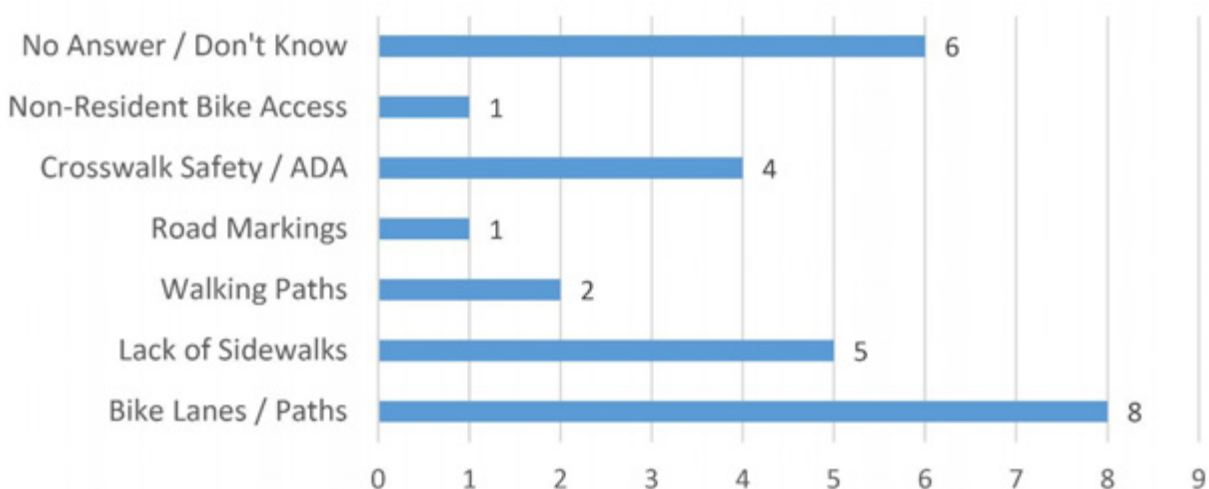
Q12: What is the Biggest Automobile-Related Transportation Concern?

Electric vehicle charging was clearly the top automobile-related concern. This also correlates with what we heard during the Board discussion, where updates to the electric grid and charging infrastructure were mentioned multiple times. Multiple answers below, when taken together, also suggest an important cluster of concerns relating to safety: speeding, ignoring stop signs, illegal parking, and people who should no longer be driving.



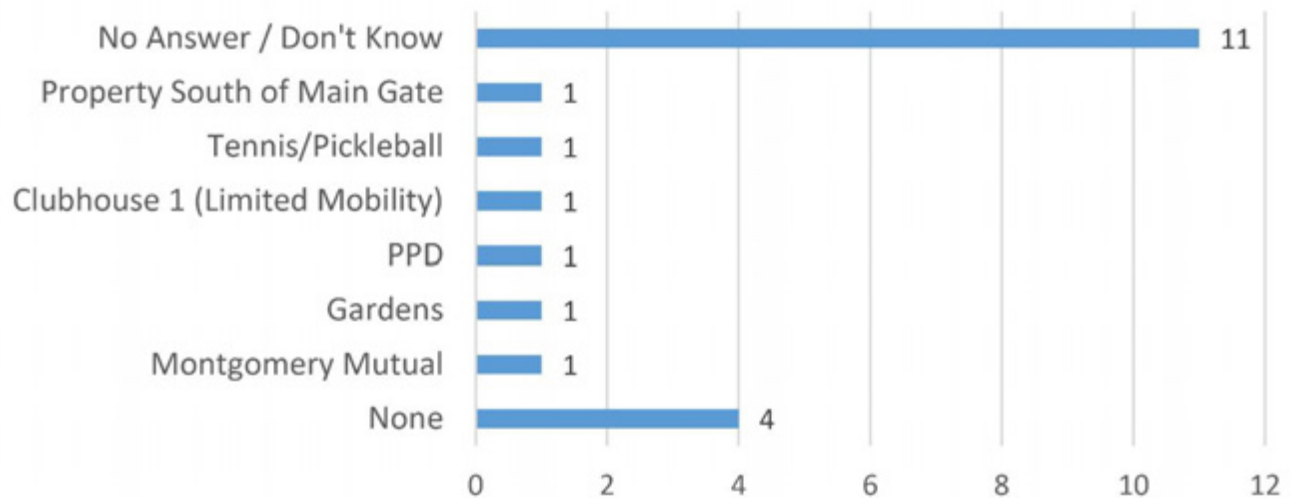
Q13: What is the Biggest Pedestrian and/or Bicycle-related Transportation Concern?

Adding bike lanes and recreational paths were the top mentioned pedestrian/bicycle transportation concerns. Comments on the lack of sidewalks and wanting more walking paths followed together at a close second. Crosswalk safety was called out as an area of concern; this is also an area of overlap with street safety mentioned in Question 12.



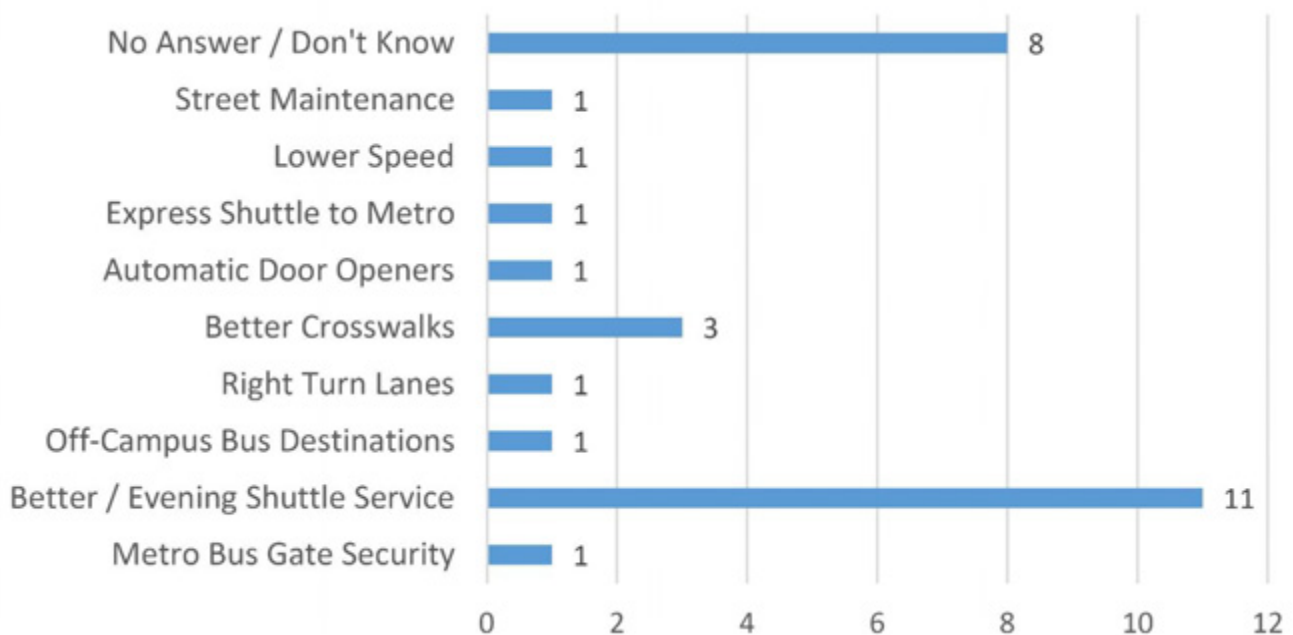
Q14: What Areas of Leisure World, if any, feel Disconnected or Isolated?

Most respondents left this question blank or said they did not know. This is different from those who responded “none,” meaning they did not feel any parts of Leisure World were isolated or disconnected. Among the remaining answers, responses were a mix of areas that are geographically isolated and one comment on being difficult to access for accessibility/mobility reasons.

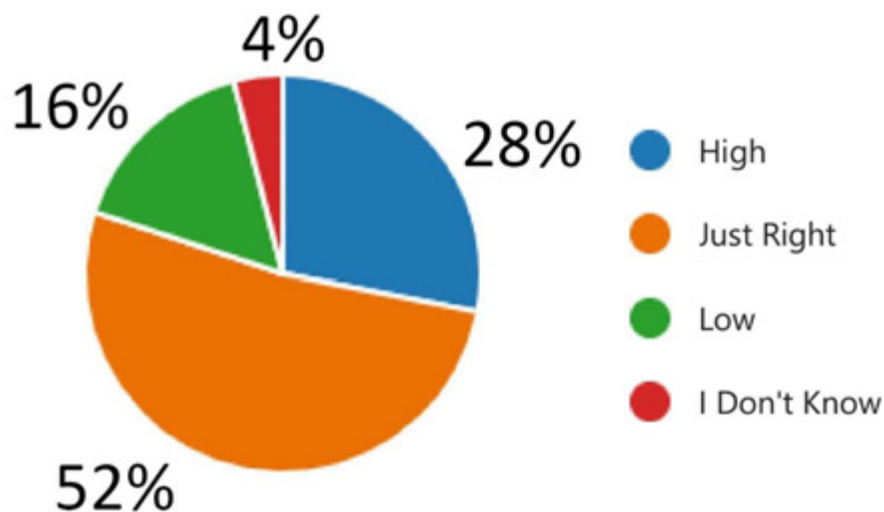


Q15: What Other Improvements to Transportation, Access, and Mobility are Desired?

The desire for a more reliable shuttle service and expanded evening hours were the most-mentioned transportation improvements. Other shuttle-related topics included more off-campus destinations and an express shuttle to the Metro station. No other obvious patterns appear.



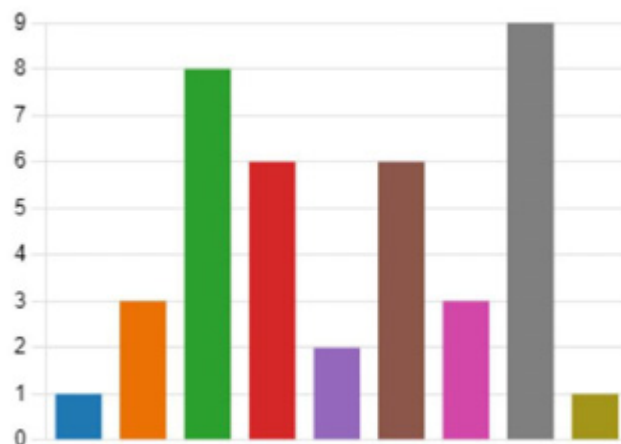
Q16: Compared to the Level of Services, Amenities, and other Offerings of the Community, how would you Characterize the Leisure World Trust Fee?



Q17: If Land were Available, what Types of Additional Housing would you like to see at Leisure World?

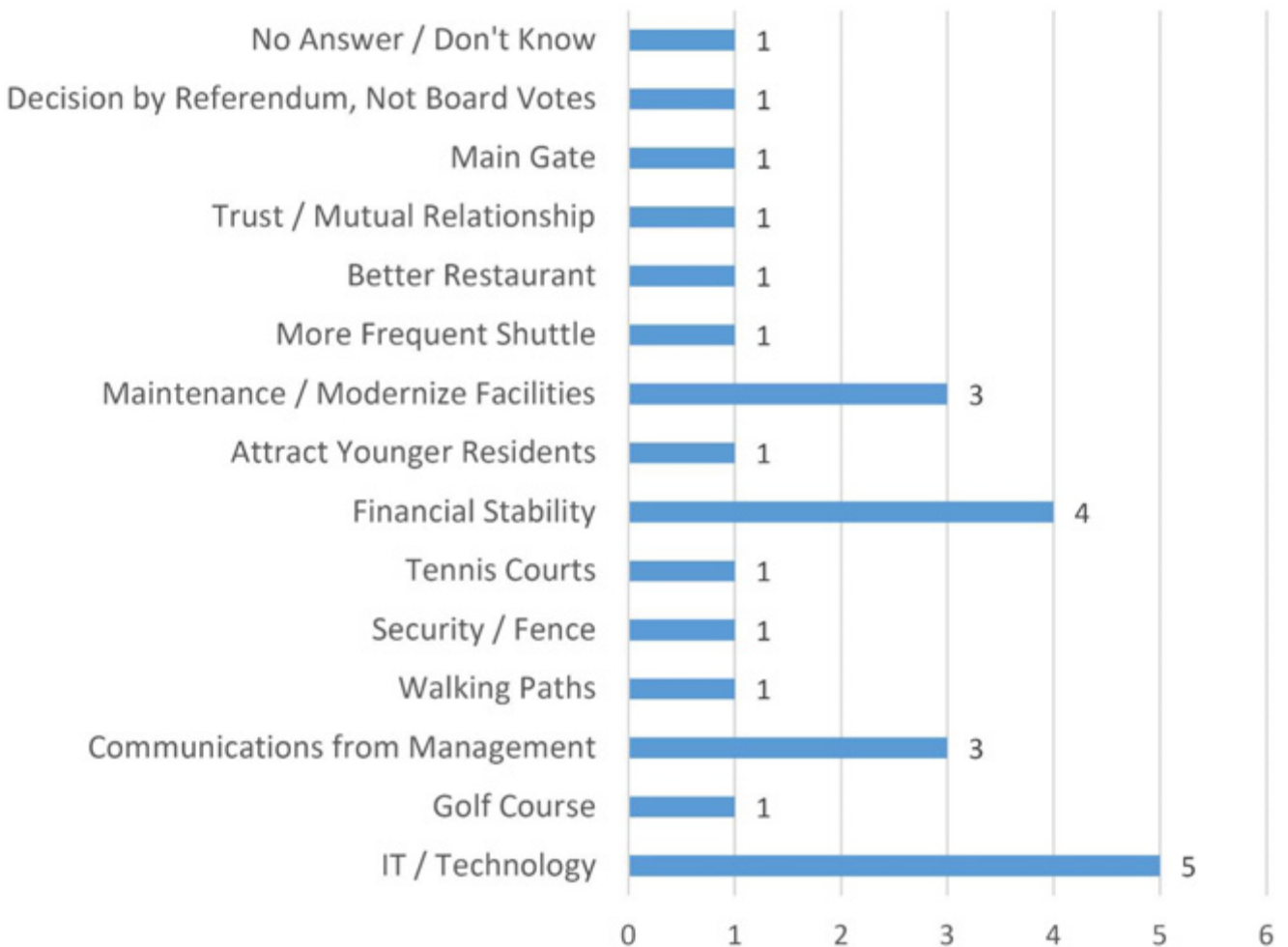
This question allowed respondents to select multiple options from a list. Approximately 3/4 of all respondents were open to more housing units at Leisure World. 9 people did not want any additional housing units. Interestingly, one respondent checked boxes for both “None” and “Guest Housing.” The “Other” response was added exposition on why there should be no more housing.

Among pro-housing responses, most people were interested in Mid-rise and High-rise units. A desire for temporary guest housing was also expressed. Single-family detached homes were the least popular.



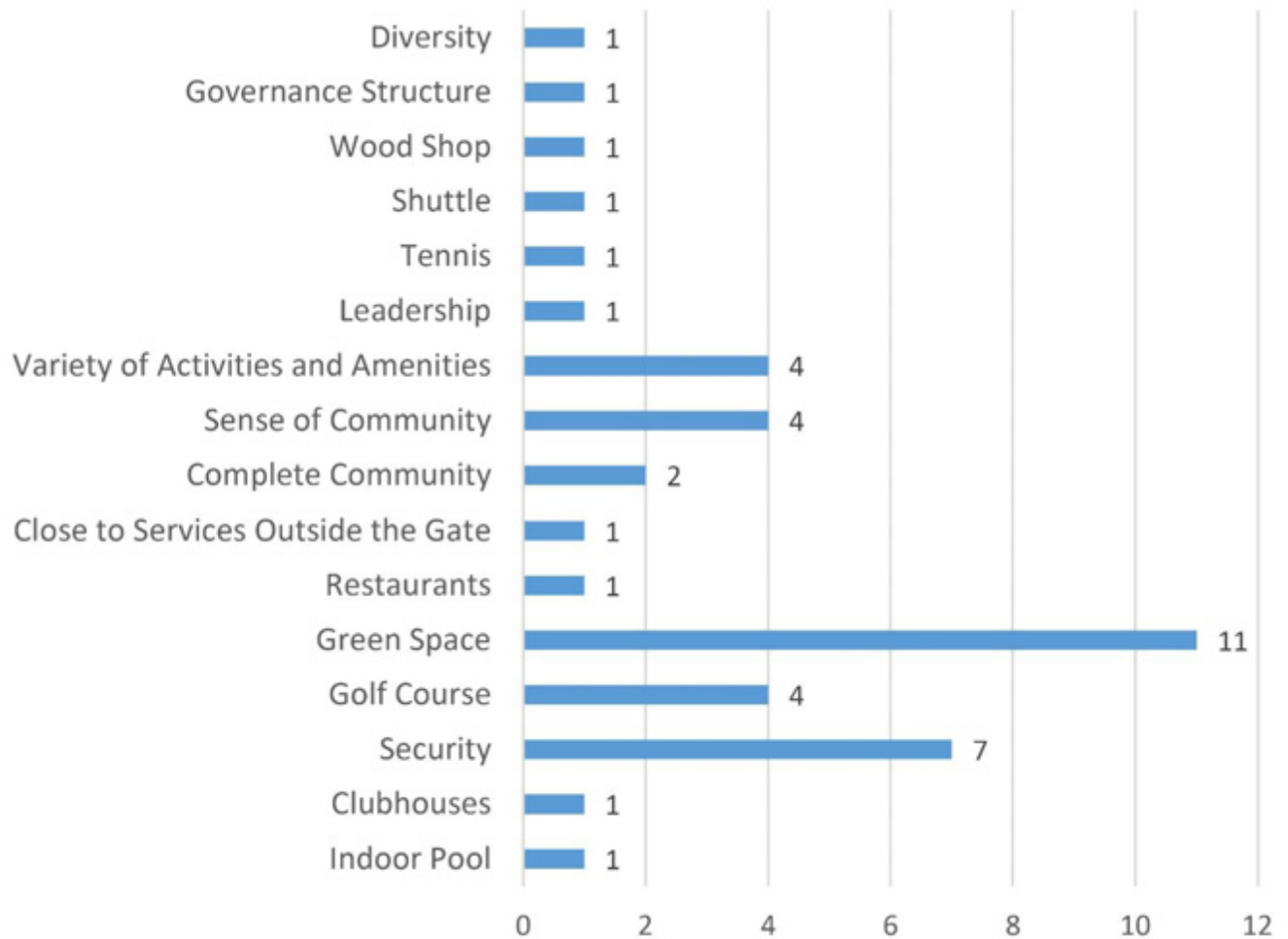
Q18: What Needs to be Changed or Improved Most?

As we heard during the special work session discussion, investments in IT and Technology represent the most answers. Financial stability, Management (specifically communication), and Modernizing facilities rounded out the most-mentioned categories. A variety of other topics were mentioned, though no patterns are clear.



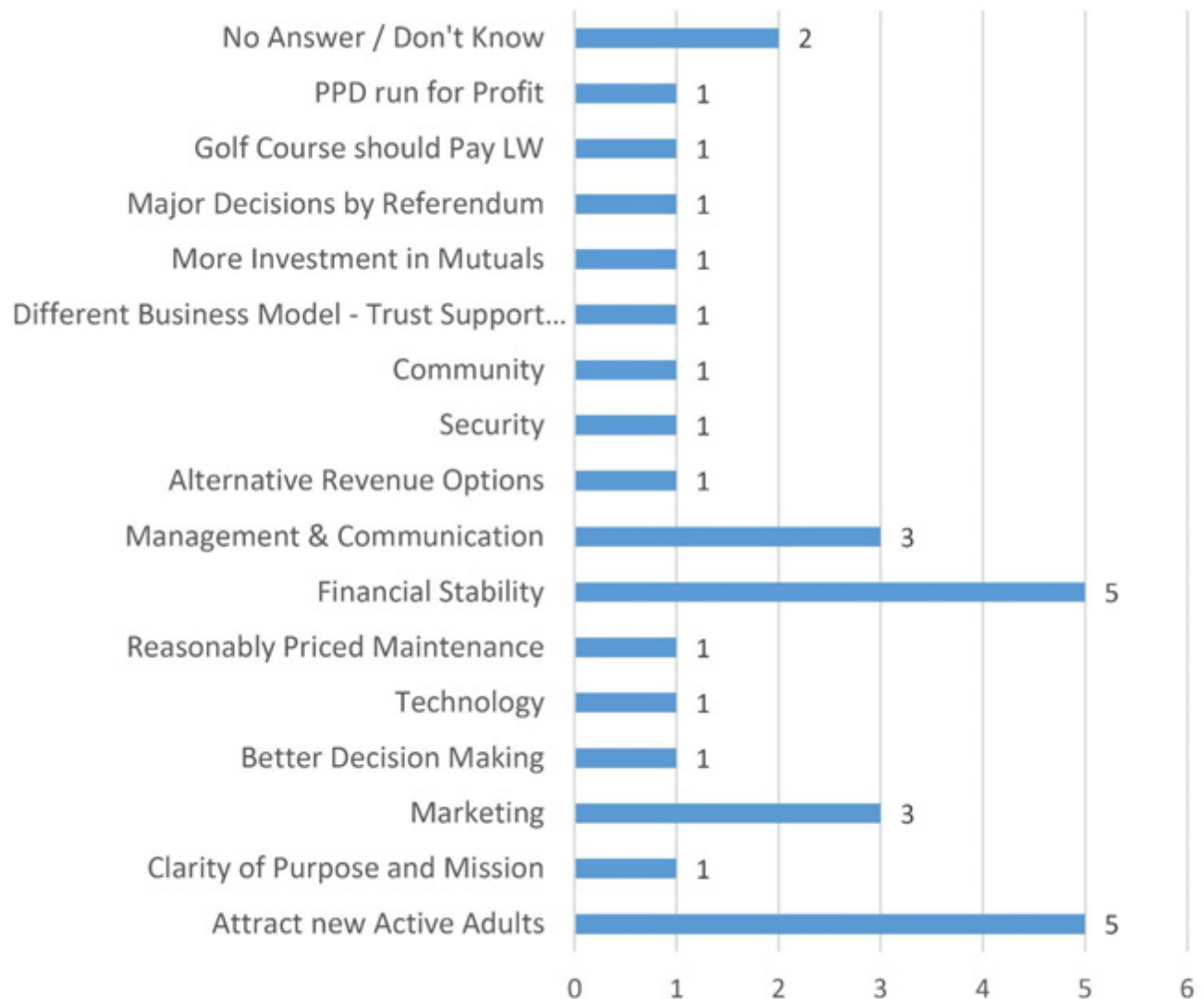
Q19: What Features of Leisure World do you Value the Most?

As we heard throughout our various discussions with residents, green space is highly valued at Leisure World. Security is also highly valued. The golf course, variety of activities and amenities, and the sense of community found at Leisure World tied as the third most valued response.



Q20: What is the Most Important Element to Ensure the Future Success of Leisure World?

Respondents listed a diverse set of elements necessary to ensure the future success of Leisure World, but the clustering of most popular answers echo other feedback we have heard. Attracting new “active adult” residents and financial security were the top two elements. Management communication and marketing are the next ranked responses. These two categories fit together and suggest the need for Leisure World to improve communications, internally and externally, to succeed. A variety of other elements were listed but did not suggest other patterns or conclusions.



Management Stakeholder Meeting: Summary and Themes

MEETING MEMORANDUM

PROJECT: Leisure World Master Plan

Regarding: **Management Stakeholder Interview**

DATE OF MEETING: 01/10/2024

ATTENDEES:

Robert Kimble	General Manager	LWMC
Rajita Andrews	General Counsel	LWMC
John Zuk	Facilities Director, Physical Properties	LWMC
Susan Montgomery	Director of Social Services	LWMC
Steve Wischmann	Senior Property Manager	LWMC
Laurie Dawson	Director of Human Resources	LWMC
Jim Rudnick	Director of Security	LWMC
Erik Aulestia	Principal	Torti Gallas + Partners
Timothy Zork	Senior Associate	Torti Gallas + Partners
Gregg Logan	Managing Director	RCLCO
Karl Pischke	Principal	RCLCO
Eric Whinnen	Senior Associate	RCLCO
Richard Moller	Senior Professional	Kimley-Horn
David Samba	Project Manager	Kimley-Horn

Introduction and Overview

- Welcome and introduction of the Leisure World of Maryland Corporation (LWMC) management staff, Torti Gallas + Partners (TGP), RCLCO, and Kimley-Horn (KH) project members.
- Brief overview of goals of the Master Plan process and roles being performed by consultant team.

Strengths, Challenges, and Opportunities

- Main strength of Leisure World is its singularity. Amenities, social activities, medical and social services are all in one place. There is nothing else like it.
- Only local Active Adult community with golf course.
- Employees and departments committed to the community and to each other.
 - Employees themselves are a strength but finding personnel is challenging.

- Particularly challenging to find employees in the building trades – especially HVAC and plumbers.
 - Finding property managers that have experience with such a large number and variety of buildings is an issue.
- Residents are one of the greatest strengths of LW, but also contribute to challenges.
 - A lot of residents are aging in place.
 - Changing perception of “active adult” community
 - Need, or want, more services and care.
 - Can overload social services.
 - Organized and motivated residents are a great strength but can also cause issues.
 - Lots of committees, lots of people that want to be involved and help, but there may be competing agendas.
- Need a younger population to maintain community perception and expectation of active lifestyle.
- Changes are needed to change perception and maintain viability.
 - Appropriate amenities to attract younger residents.
 - More pickleball, dedicated pickleball facility
 - Conflicts between tennis players and pickleball players
- Need to focus marketing and outreach as a 55+ active adult community.
- People are moving into Leisure World because of “affordability.” They should be moving into Leisure World because of the “lifestyle.”
- 34-member Board of Directors can cause extended discussion/debate and impede timely decision-making.

Facilities and Maintenance

- Catching up on deferred maintenance.
- Previous decisions to defer maintenance have led to significantly more expensive solutions later.

Indoor Amenities and Clubhouses

- Response to statement that lots of clubs want meeting space, but there are not enough rooms.
 - There are a lot of rooms available, but everybody wants to meet at the same time.
 - When the new administration building is complete, additional rooms and meeting space will become available and will help with the issue. Also, one of the large rooms is dividable.
- Top priorities for Clubhouses

- Indoor Pool
 - Need to replace windows and doors.
 - Pool heat and humidity controls need to be replaced.
- Outdoor Pool
 - Pool fence not up to code, awaiting decision from County on exemption. May need to rebuild well/fence.
 - Opportunity to build a new outdoor pool and convert the existing sunken pool into an amphitheater.
 - Outdoor entertainment space is important.
- Look at new multiuse sports and entertainment building.
 - As an example, an Active Adult community in AZ increase from 8-pickleball courts to 28-courts
 - Larger venue for bands, concerts
 - Small number of indoor tennis/pickleball courts
 - Where is space available for a new facility?
- Rebuilding indoor theater at Clubhouse II not a high priority when considering other needs.

Outdoor Amenities

- Golf is a differentiator, drives value.
 - Possible legal issues from residents who paid extra for “golf view” units.
 - More rounds of golf and more revenue generated over the past few years.
 - ±22,000 rounds of golf last year (compared to 30,000 rounds capacity).
 - Conflict between walkers and golfers
 - Allowing early morning walkers on course cuts off valuable tee times that would lead to increased rounds played. Until 8:30 walker are permitted, but should have tee times starting at 6:30.
 - At 5:00-5:30 people walk in the middle of play.
 - Opportunity for a dedicated circumferential walking path that does not conflict with golf course.
- Not enough pickleball
- Conflict between tennis players and pickleball players
 - Need to provide dedicated facilities for each.
 - Indoor courts could be shared.
- Priorities
 - Pickleball
 - Outdoor Venue
 - Reaction to tot lots - amenities for visiting children/grandchildren are not a priority. Many close-by playgrounds and parks just outside the gate.

Security

- Misconception that security isn't good.
 - Jim Rudnick has turned things around 180 -degrees since joining.
- Systems have been modernized and computerized.
- Top Security Challenges?
 - Backups at Norbeck Gate
 - Working through plans to address – will provide TG+P with plans.
 - Treatment of staff by some residents can be abusive.
 - Maintenance and repair of perimeter fence
 - No cameras along perimeter fence
 - Would be very expensive to install.
- What improvements would you like to see?
 - Norbeck Gate
 - Switching to electronic door locks with keycard access for Gym, Computer Room, etc.

Social Work

- Caseloads have increased over the past 5-10 years.
- Working with 35% of the resident population.
 - ±400 open cases
- 3 Full-time, 2 part-time
 - Licensed for counselling, but do not provide that service.
- Social Work works with residents to help them find the services they need.
 - Develop relationships and try to help people recognize if they need to move into a different type of facility.
- Contacted directly by residents.
- Also get referrals from staff, security, neighbors, family, etc.
- What are the causes of increased case load?
 - People are living longer.
 - People are choosing to age-in-place.
 - Pandemic-related health concerns
 - Increase in mental health concerns.
 - MedStar used to have therapists and psychiatry on-site, but they have left.
 - Places burden on Social Work
 - Working to bring outside mental health practitioners onsite.
 - Would like MedStar to bring back mental health services.
- Work with MedStar team, need to be in the same facility.

Human Resources Management

- Hiring Challenges
 - Gate Guards
 - Tradespeople (especially HVAC and plumbers).
 - Have been increasing salaries, but can be paid higher outside LW.
 - Make case that lower pay is worth working on-site as opposed to driving from job to job all day.
 - Need to develop better onboarding and orientation support for employees.
 - Need better IT support.
 - Some staff members have to interact with rude or abusive residents.
- Employment Structure
 - Almost all staff are employees of Leisure World of Maryland Corporation
 - Cleaning and Landscaping are outsourced.
 - Major infrastructure projects (concrete, asphalt, roads, etc.) use outside contractors.

Other Comments

- Observation that the attendees at the Town Hall meeting were “younger and healthier” than the average resident they interact with.

This Conference Report is the writer’s understanding of the events/discussions that took place. Please contact the undersigned in case of disagreement/clarifications.

Prepared By: Timothy W. Zork

Draft Opportunities Diagram



Future Transportation Impacts

LEISURE WORLD OF MARYLAND **MASTER PLAN FOR TRUST PROPERTIES**



MEMORANDUM

To: Erik Aulestia, Torti Gallas + Partners
Timothy Zork, Torti Gallas + Partners

From: David Samba, PE
Sonia Panic, EIT
Kimley-Horn and Associates, Inc.

Date: May 6, 2025

Subject: Future Transportation Impacts Memorandum

Introduction

The purpose of this memorandum is to provide a high-level summary of the existing transportation and parking conditions at Leisure World and to identify existing challenges and potential opportunities that can be addressed through the master planning efforts. Furthermore, regional transportation planning documents were reviewed to determine ongoing or planned transportation network changes that may impact access and mobility to and from Leisure World.

Community Perspectives

During the November 2023 Leisure World Town Hall meeting, residents were asked to share their thoughts in small, round table format discussions. Discussion centered around indoor and outdoor amenities, the services provided at Leisure World, and transportation/parking within the community. During this meeting, project team members obtained residents' perspectives on the existing facilities in Leisure World and what values they would like to see reflected in the community facilities through the master planning efforts.

Participating residents emphasized that Leisure World is an active adult community and that the amenities and services provided should reflect and support that vision. With respect to transportation and parking, residents expressed a desire for expanding walking and biking options throughout the community with the inclusion of walking trails, more complete sidewalk networks, and the installation of bike lanes. These amenities were requested to fulfill dual recreational and commuting uses. Participating residents also indicated that the plan should be responsive to the varying mobility levels in the community and provide mobility and parking recommendations that meet the needs and abilities of all residents at Leisure World.

Challenges

Themes mobility challenge themes that emerged during the discussions include:

- **Lack of Safe and Convenient Crossings** - When asked 'What are the most convenient ways to travel across Leisure World?' participating residents indicated that walking was the most convenient way to travel. Because many residents enjoy walking throughout the community, they also indicated that safety while crossing was a concern. Residents expressed a desire to see more logical, safe, and convenient crossings with marked crosswalks throughout the community, particularly across Leisure World Boulevard.
- **Challenging Sidewalk Network** - Many residents commented on the quality of the sidewalk network within Leisure World specifically noting uneven pavement, inadequate sidewalk widths, and missing sidewalk connections. These substandard qualities contribute to the feeling of a disconnected or disjointed transportation network throughout the community.
- **Unreliable Shuttle System** – During the discussion, the shuttle bus was ranked as one of the least convenient ways to travel across Leisure World due to schedule, operating hours, and routing limitations. Residents desired service hours extended beyond current times to reinforce the vision of an active adult community with mobility needs throughout the entire day. Furthermore, residents would like to expand shuttle service coverage to connect Leisure World residents to regional transit stops or popular destinations, such as shopping centers or downtown Washington D.C. (i.e. more direct transit service instead of relying on Montgomery County services).
- **No campuswide Scenic Walking Loops** – During the COVID-19 Pandemic, residents were permitted to walk on the Leisure World golf course at any time, but now walking times are restricted to times when the golf course is not being used. While residents can walk the Leisure World Boulevard loop, the loop is not seen as desirable for multimodal recreational trips.
- **Norbeck Boulevard Gate** – The Norbeck Boulevard entrance was identified as an area on campus that residents identified as an access concern. Some feedback included adding a second lane at the gate or making it simpler/easier to access.

Opportunities

After analyzing the existing conditions and community feedback, the following opportunities were identified as opportunities that may further support or enhance the desired mobility and accessibility within/around the Leisure World community.

- **Leisure World Boulevard Improvements** – Leisure World residents place tremendous importance on the landscaping, greenery, and open space available within the community. Future transportation facilities installed along Leisure World Boulevard should focus on emphasizing traffic calming measures and incorporating landscaping and other natural elements to slow down drivers and reduce the level of traffic stress for walkers and bicyclists. Furthermore, a redesign of Leisure World Boulevard, specifically at different entrances or access points to the surrounding area, may provide more opportunities for connections with

on-street bike facilities external to Leisure World such as those identified in regional planning studies.

- **Community Trail System** – Trails create healthy recreation and transportation opportunities by providing users with dedicated places to walk or bike and expose users to greenspaces and nature. A community trail that traverses Leisure World may support residents' desires for more recreational walking and biking amenities, while supporting the vision of Leisure World as an active adult community.
- **Expanded Shuttle Services** – Future shuttle service should be restructured to provide more convenient and timely shuttle schedules and routes. To improve shuttle schedules and timing, careful planning should be made to ensure shuttles do not arrive at the same stops at the same times. Furthermore, there may be an opportunity to expand the Leisure World shuttle service area to surrounding destinations. If an internal Leisure World shuttle cannot be used to increase service coverage area, there may be an opportunity to develop relationships with regional transportation providers to provide those services.
- **Dedicated bicycle facilities** – On or off-street dedicated bicycle facilities (lanes, bike racks, covered parking, repair station) would improve the safety and viability of bicycling as an option while also reducing the number of conflicts that a pedestrian has to accommodate on the sidewalk.
- **Improved shuttle/transit amenities** – developing a covered transits stops with benches strategically located near key locations as well as coordinating site design and shuttle vehicle selection to accommodate zero elevation boarding.

Ongoing Transportation Plans

After identifying potential opportunities to address in the master plan, regional plans, projects, and studies were reviewed to determine the impacts of any future planned transportation projects that are near or connect to Leisure World. Identifying ongoing or future transportation projects may “unlock” additional opportunities for transportation improvements through collaboration and synergy. These projects can also connect with any proposed Leisure World improvements to create seamless regional mobility options for Leisure World residents. The following Montgomery County plans, projects, or studies were reviewed for ongoing or future planned transportation projects that are near or connect to Leisure World:

- [Bicycle Master Plan](#)
- [Countywide Transit Corridors Plan](#)
- [Master Plan of Highways and Transitways](#)
- [Pedestrian Master Plan](#)
- [Vision Zero Projects](#)

BICYCLE MASTER PLAN

The Montgomery County Bicycle Master Plan makes recommendations for a low-stress network of bikeways throughout Montgomery County. The goal of this system is to ensure cyclists of all ages and abilities are comfortable and safe riding to transit stations, employment centers, shops, public

facilities and other destinations in Montgomery County. Currently, there are a limited number of bicycle facilities that provide access to/from Leisure World, as shown in Figure 1.

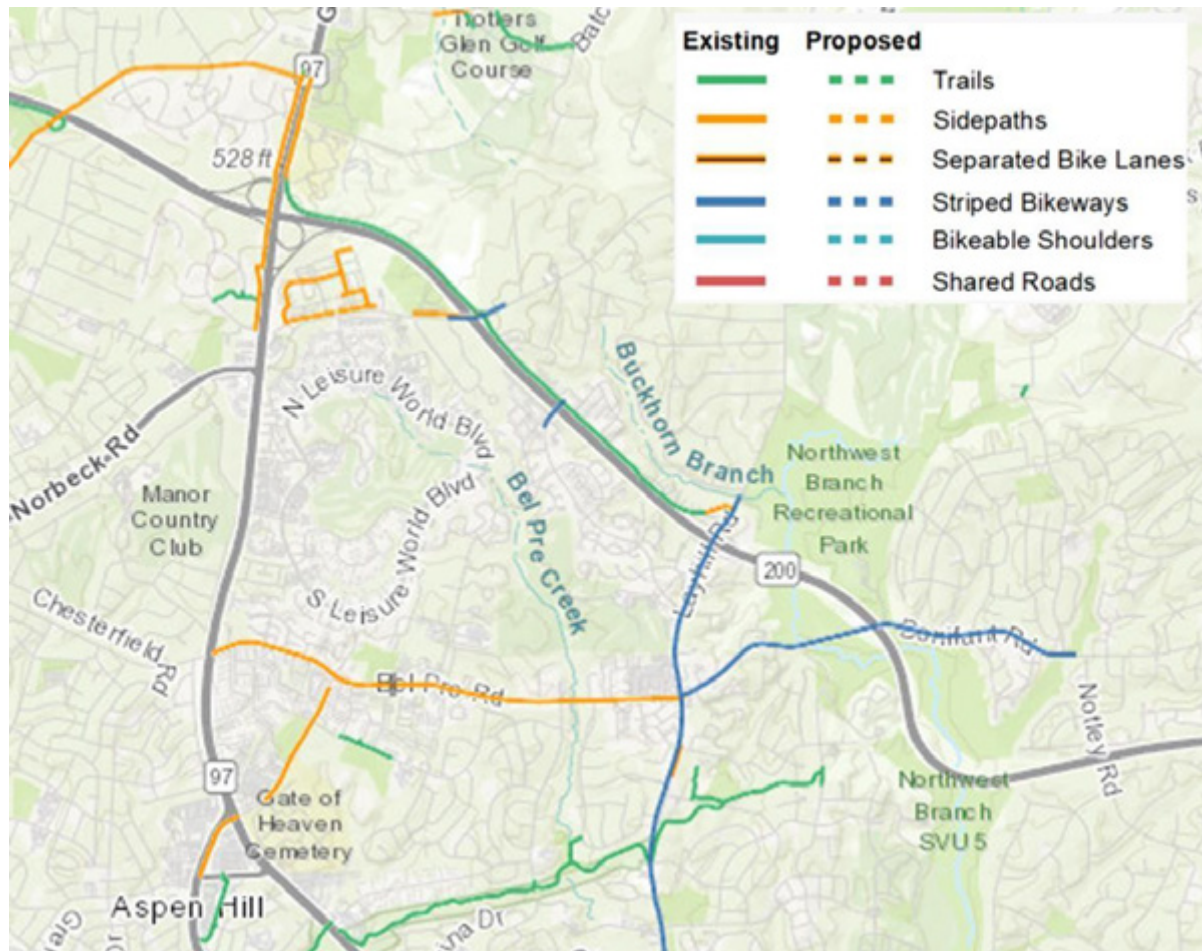


Figure 1: Existing Bicycle Facilities near Leisure World

A sidepath, which is a bidirectional shared use path typically located immediately adjacent and parallel to a roadway, is located on the southside of Norbeck Road. This existing sidepath provides Leisure World residents a bicycle connection to the Layhill Shopping Center. Furthermore, this sidepath connects with a striped bikeway on Layhill Road, which provides a connection to the Glenmont Metro station further south. A bicycle level of stress analysis of nearby roads indicates that most roads are high or moderate stress levels. Bicycle level of traffic stress is an approach that quantifies the amount of stress that bicyclists feel when they ride close to traffic. It assigns a stress level to streets and bikeways based on factors such as traffic speed, number of lanes, frequency of on-street parking turnover and ease of intersection crossings. When a street or bikeway receives a poor score, it is a sign that improvements are needed to make it a place where more people will feel

comfortable bicycling. The northside of Norbeck Road, Georgia Avenue, and Leisure World Boulevard are considered High & Moderate stress streets for cyclists.

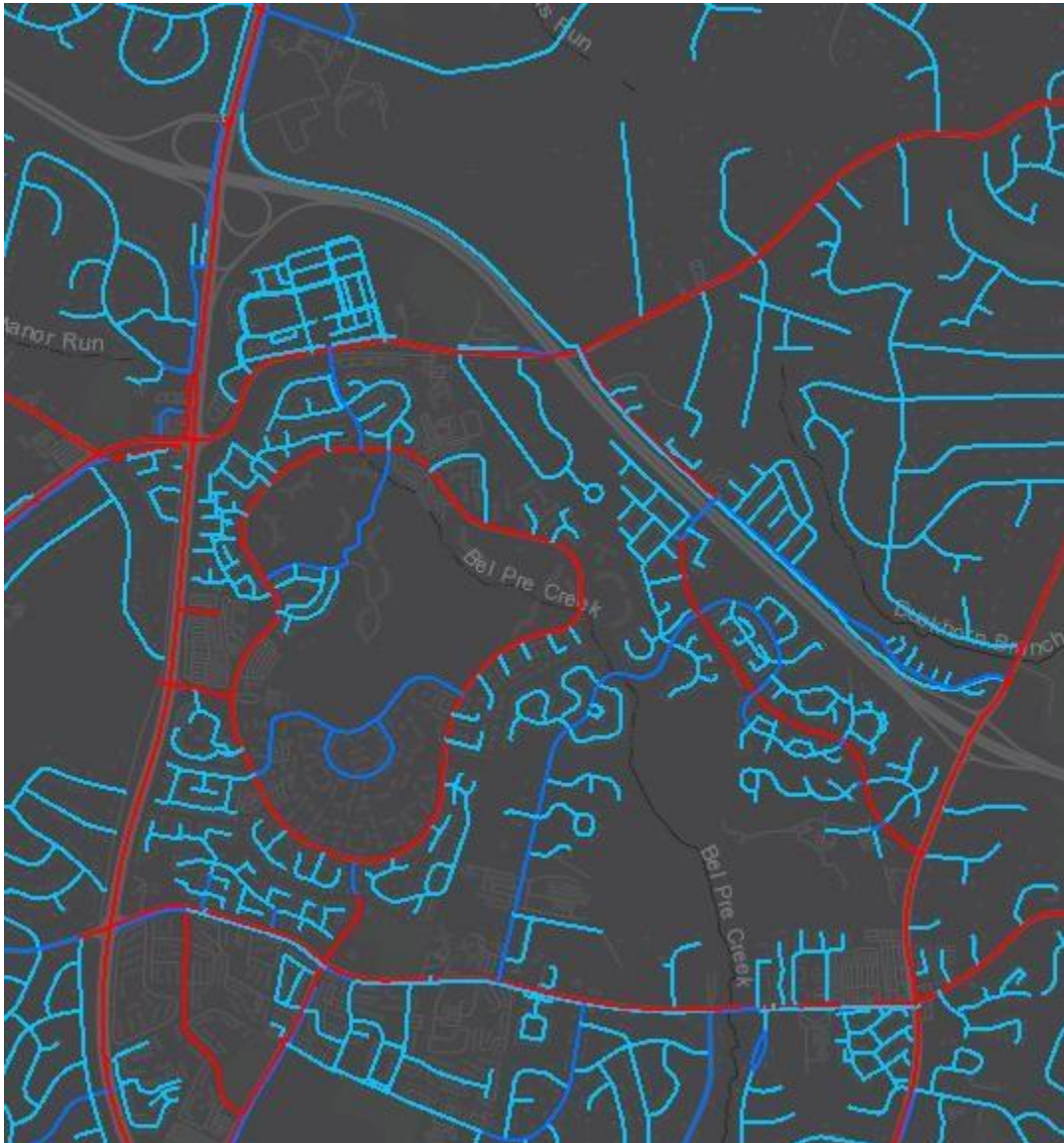


Figure 2: Level of Traffic Stress

Future planned bike facilities will surround the entrances/exits of Leisure World to create more access points for residents. Figure 3 below shows the complete network of bicycle facilities, which include existing and future planned improvements. It is worth noting that parts of the Leisure World Campus fall within the the Equity Focus Areas of the Bicycle Master Plan.

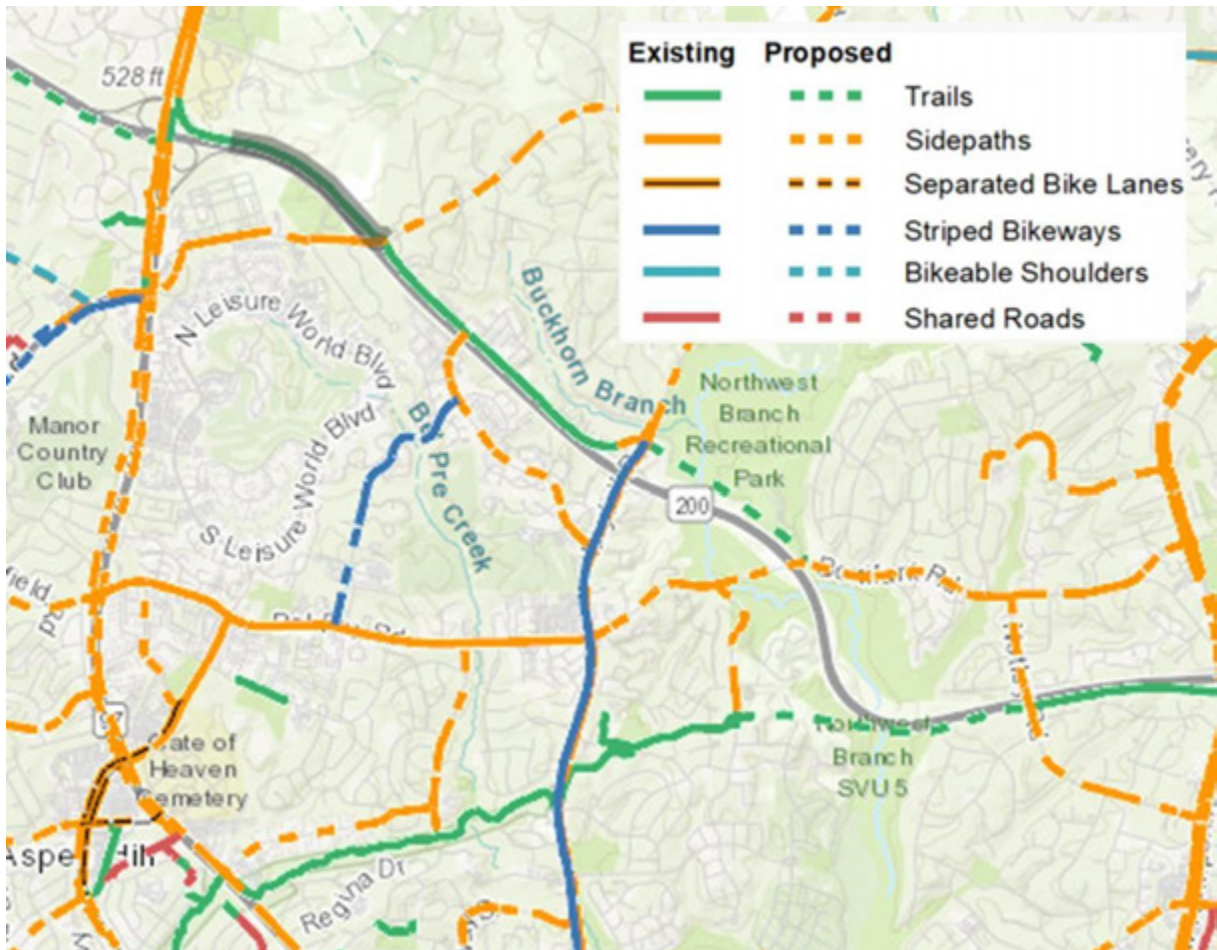


Figure 3: Future Planned Bicycle Facilities

These new bicycle connections will provide Leisure World residents more flexibility and choice for how they move about the area. Currently, Leisure World residents can only safely access an existing sidepath from the Connecticut Avenue entrance/exit. The new proposed sidepath along Georgia Avenue will provide additional safe access for residents. New bicycle facilities will provide residents greater access to public parks, such as the Northwest Branch Recreational Park or Rock Creek Regional Park by allowing them the choice and flexibility of where they access these regional amenities. Furthermore, new bicycle facilities planned within the vicinity of Leisure World will provide residents with greater access to Northgate Plaza and Aspen Hill Shopping center.

COUNTYWIDE TRANSIT CORRIDORS PLAN

The Countywide Transit Corridors Plan recommends a transit corridor network and makes recommendations for stations (which are typically located by the nearest intersection) to accommodate bus rapid transit (BRT) services. BRT works where development densities may be lower than those that warrant light rail, but where greater transit speed and efficiency is needed beyond what standard local bus service can provide.

This Functional Master Plan makes no changes to current planned land use or zoning but recommends changes and additions to the transportation network that are needed to serve the County's most densely developed areas, areas planned for redevelopment, and areas planned for new dense development.

There is no existing BRT service located within the vicinity of Leisure World. Local service, provided by Montgomery County Transit (RideOn), connects Leisure World to the Glenmont Metro Station in the south, Montgomery General Hospital in the North, and to neighboring jurisdictions (such as Rockville) throughout the area. Figure 4 displays the existing routes within the immediate vicinity of Leisure World.

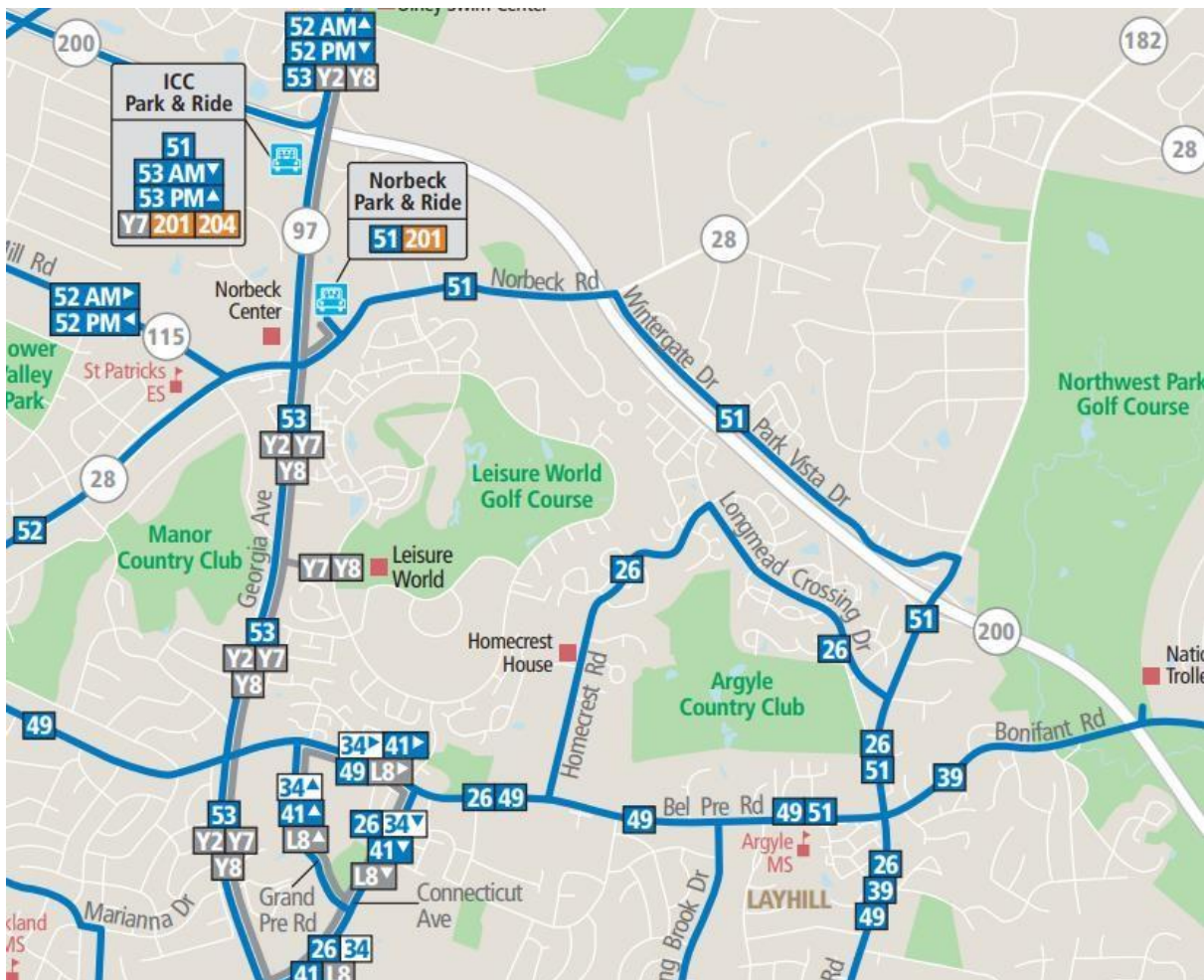


Figure 4: Bus Routes Connecting Leisure World

There are 11 corridors included in the Countywide Transit Corridors Master Plan. Corridor 1, Georgia Avenue North, will provide BRT service along Georgia Avenue. Georgia Avenue North is a commuter corridor with several activity centers in the south and residential communities in the north. Due to congestion trends during peak travel periods, a single dedicated transit lane is recommended. More specifically, a dedicated lane for BRT service is recommended along Georgia Avenue from Olney-Sandy Spring Road to Reddie Drive. A map of the proposed BRT corridor 1 is shown in Figure 5.

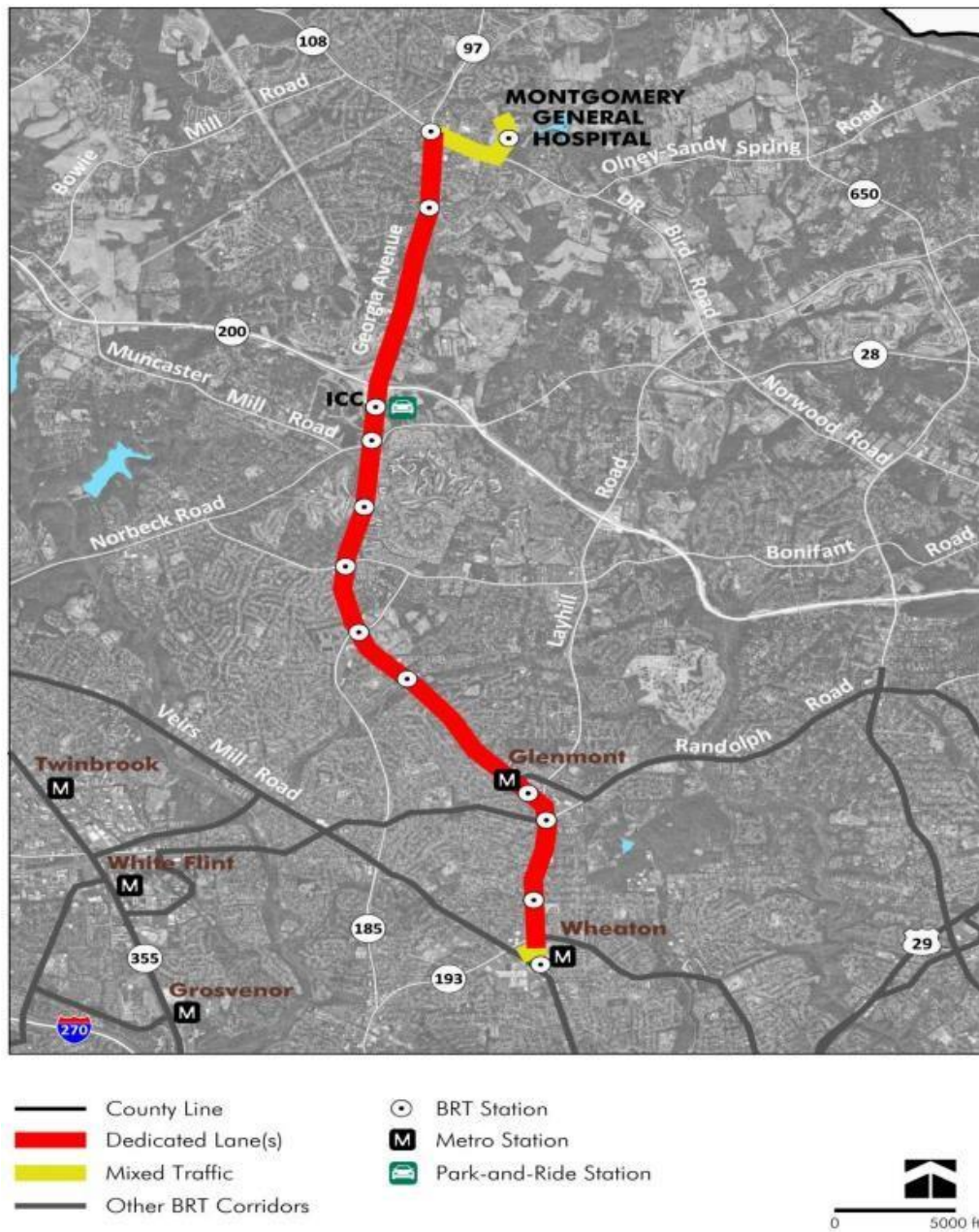


Figure 5; Corridor 1 BRT Route

The proposed BRT corridor will provide Leisure World residents with faster and more reliable transit service to the Glenmont and Wheaton Metro stations, which will further connect residents with downtown Washington, D.C. Along corridor 1, Leisure World residents will have access to several bus stops at convenient locations to the Georgia Avenue and Connecticut Avenue entrances/exits including:

- Georgia Avenue and Rossmoor Boulevard
- Georgia Avenue and the Norbeck Park & Ride
- Georgia Avenue & Bel Pre Road

MASTER PLAN OF HIGHWAYS AND TRANSITWAYS

The Master Plan of Highways and Transitways is a functional master plan that provides guidance and tools for transportation improvements. The master plan encapsulates all existing and planned transportation facilities, and preserves planned rights-of-way to accommodate future transportation systems, including highways, transitways and pedestrian and bicycle facilities. Upon review, no planned projects were within the vicinity of Leisure World or impacted access to/from the community.

PEDESTRIAN MASTER PLAN

The Pedestrian Master Plan documents the pedestrian experience in Montgomery County today, and makes recommendations in line with national and international best practices so being a pedestrian here is even better in the years ahead. As part of the plan, a pedestrian level of comfort (PLOC) map was developed to quantify how comfortable people feel when they walk in certain traffic conditions. The PLOC map was used to analyze existing pedestrian facilities that are near or connect to Leisure World. As shown in Figure 6, the entrances/exits to and from Leisure World range from 'Very Comfortable' to 'Somewhat Comfortable'. However, the peripheral network along Georgia Avenue or Bel Pre Rd ranges from 'Uncomfortable' to 'Undesirable'. This disconnect in level of comfort between facilities may lead to an unenjoyable walking experience from Leisure World to the surrounding area. Furthermore, several segments along Leisure World Blvd are ranked 'Uncomfortable' or 'Undesirable' which may contribute to undesirable walking experiences.

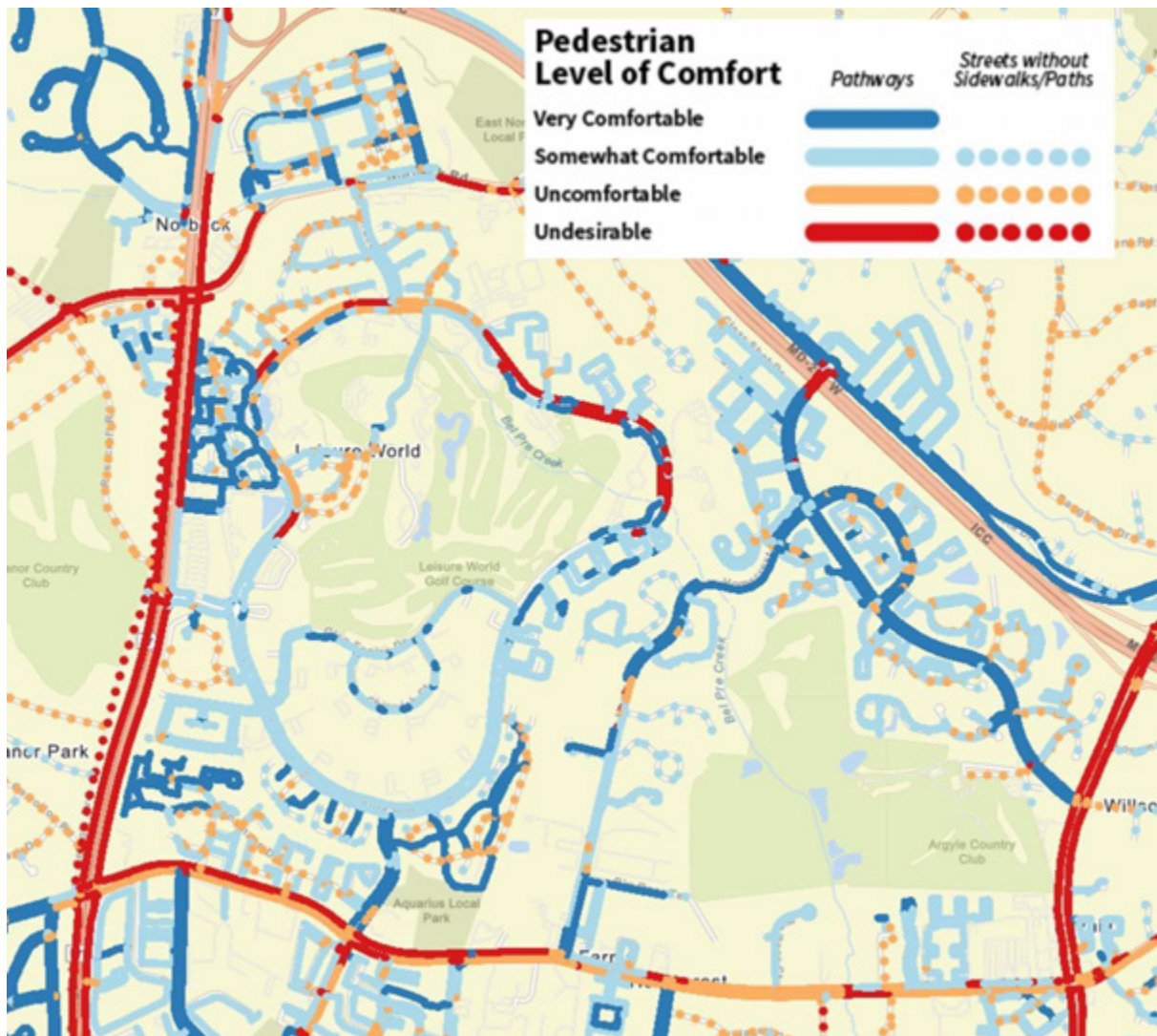


Figure 6: Pedestrian Level of Comfort

The Pedestrian Master Plan identified a methodology for prioritizing location for improved pedestrian facilities. By prioritizing locations for improvements, the County will ensure that limited resources are used where the need is the greatest. The Bicycle and Pedestrian Areas (BiPPA) funding program, which has evolved since its creation in 2014, and prioritizes potential new projects/areas that:

- Have low levels of pedestrian and bicycle comfort
- Are near schools and transit stations
- Have high pedestrian and bicycle demand
- Have more pedestrian and bicycle crashes

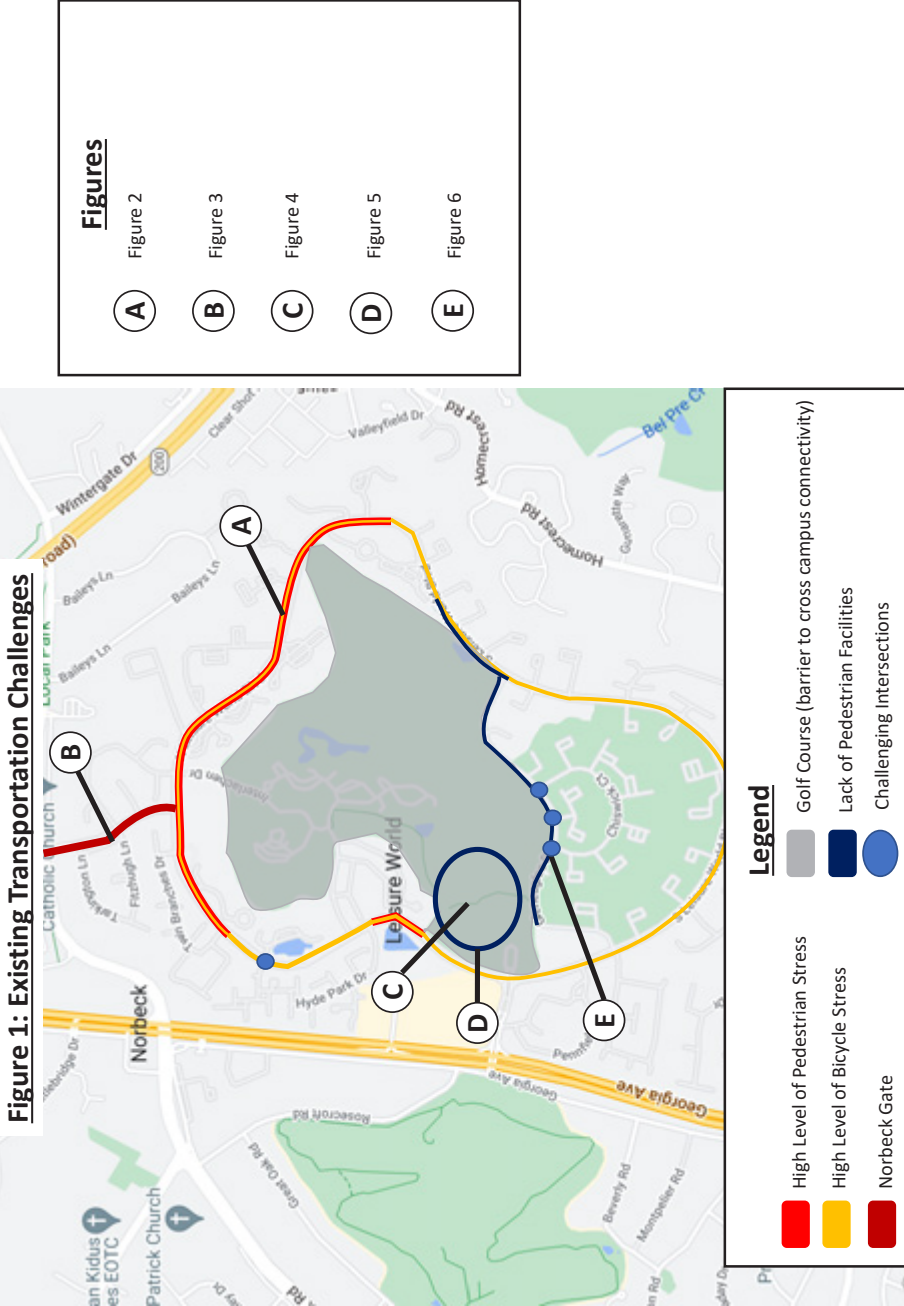
Additional emphasis is given to emphasis focus areas (EFAs) within the county. The BiPPA funding program categorizes BiPPA projects/areas in four tiers, with Tier 1 being the highest tier. Tier 1 projects/areas are currently funded in the six-year Capital Improvement Plan (CIP). As such, Bel Pre Road from Georgia Avenue to Layhill Shopping Center was identified as a Tier 1 BiPPA project/area for new pedestrian facilities. This segment of Bel Pre Road intersects with the Connecticut Avenue entrance/exit to Leisure World. Improved pedestrian facilities may safely and better connect Leisure World residents with the amenities located at Layhill Shopping Center. A Tier 3 BiPPA project/area was identified along Emory Lane from Muncaster Mill Road to Georgia Avenue. This is primarily a residential connection located near Leisure World and is not anticipated to have any direct impact with Leisure World access.

MONTGOMERY COUNTY VISION ZERO PROJECTS

Vision Zero is an approach to preventing roadway-related deaths and severe injuries. Through its 2016 resolution, Montgomery County committed to eliminating traffic fatalities and severe injuries. In 2017, the County Executive released an initial two-year action plan of activities to advance the County toward Vision Zero. Using historic crash information from 2015-2019, Montgomery County Vision Zero initiative identified High Injury Networks throughout the county. These networks experience some of the highest number of severe or fatal crashes within the county. Bel Pre Road between Georgia Avenue and Layhill Town Center is considered a High Injury Network as it had 16 pedestrian crashes, 3 of which were severe/fatal. As a result of this designation, a safety audit was completed in August 2021 to determine safety upgrades along Bel Pre Road. 3 HAWK signals were installed along the segment. This Vision Zero plan recommends a signal head be installed at the intersection of Bel Pre Road and Rippling Brook Dr.

Key Takeaways

- Walking and biking are highly desired methods of transportation and recreation. More dedicated infrastructure would enhance the real and perceived safety of these modes
 - Bike lanes
 - Bike racks and covered parking
 - Wider sidewalks (8 to 10 feet)
 - Filling in gaps in sidewalk / addressing necessary maintenance
- Golf course presents a barrier to cross-campus mobility
- Shuttle system does not currently conform the needs of all residents
 - Reevaluate shuttle stop location and amenities; shuttle type and ADA accommodations; shuttle hours/days of operation
 - Integrate high quality shuttle stop design into any future site redevelopment
- Additional traffic calming measures should be installed to address vehicle speeds and visibility/prioritization of pedestrians
- Parking lots could be reconfigured to provide additional access, circulation, and flow improvements



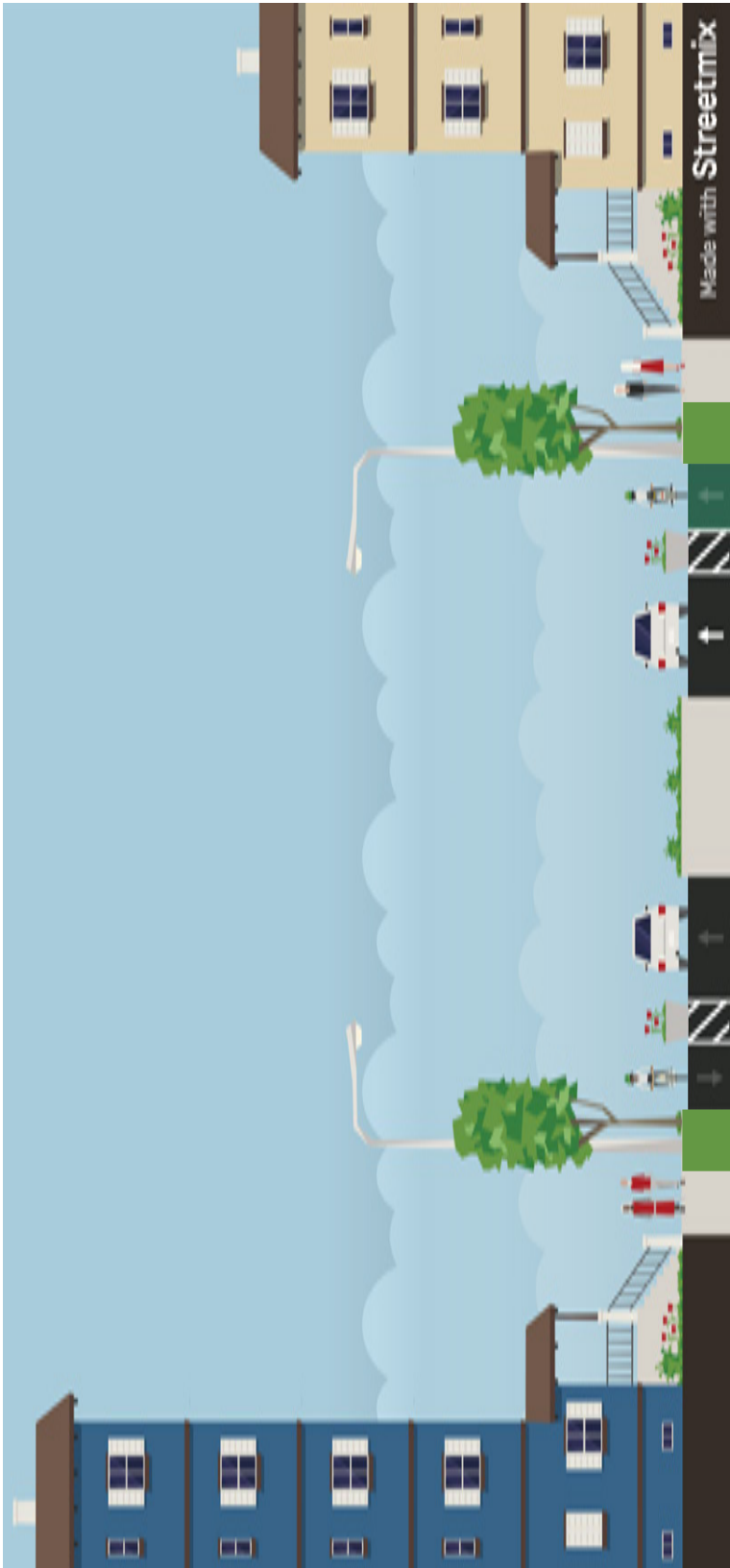


Figure 2: Potential Improvements along Leisure World Boulevard (A)

- Missing pedestrian connectivity
- Missing sidewalk connection not Norbeck Boulevard
- Sidewalk connection is recommended

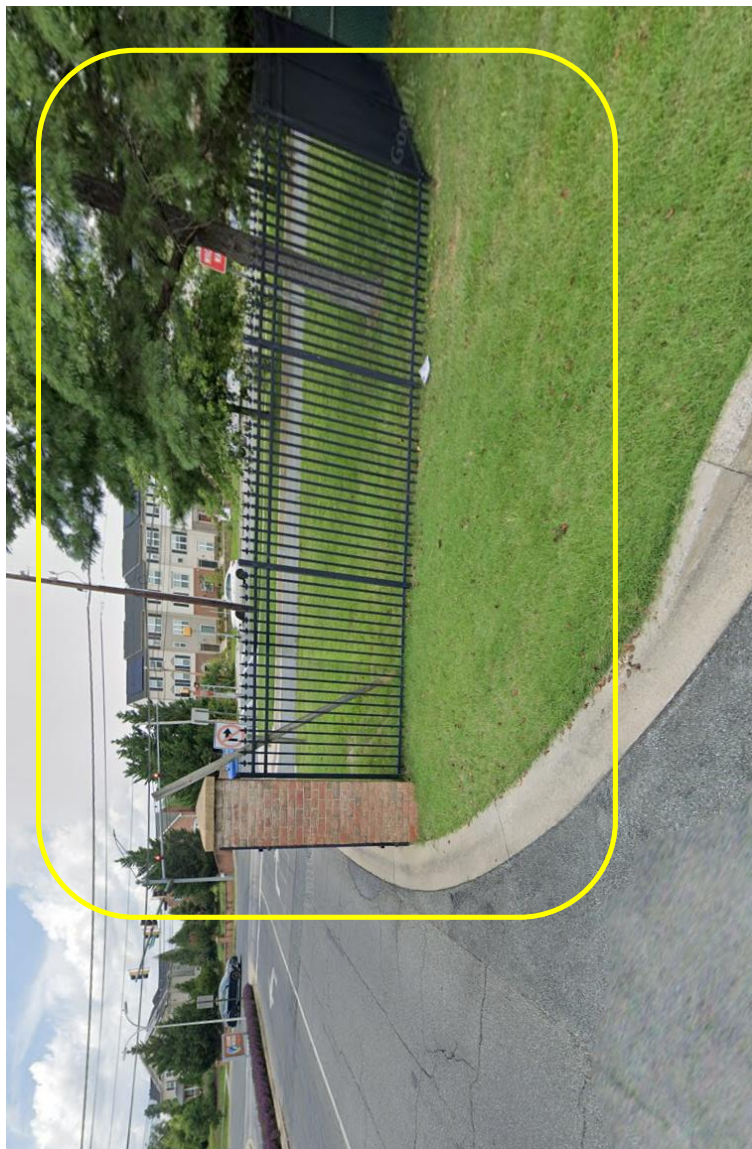


Figure 3: Potential Improvements at Norbeck Gate (B)

- Missing pedestrian connectivity
- Walking trails through golf course recommended

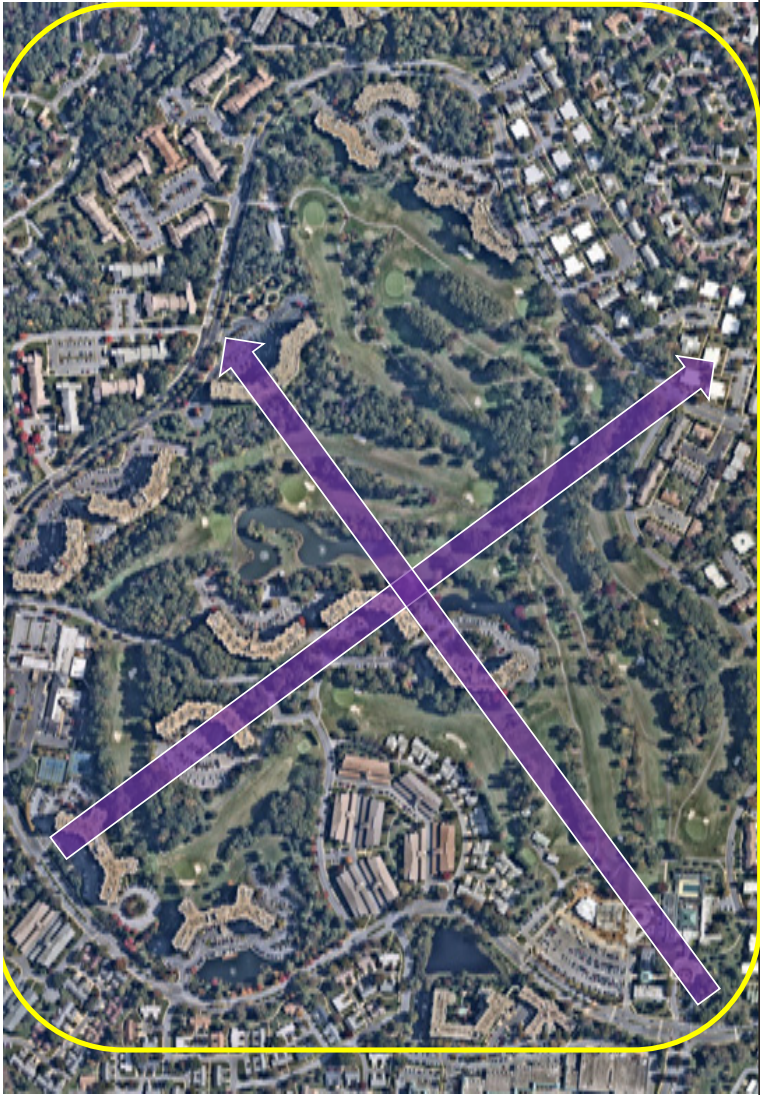


Figure 4: Potential Improvements to Golf Course (C)

- Missing pedestrian connectivity to Clubhouse I
- Difficult for pedestrians to navigate parking lot
- Inefficient drive aisle striping (one-way)



Figure 5: Potential Improvements to Clubhouse I (D)

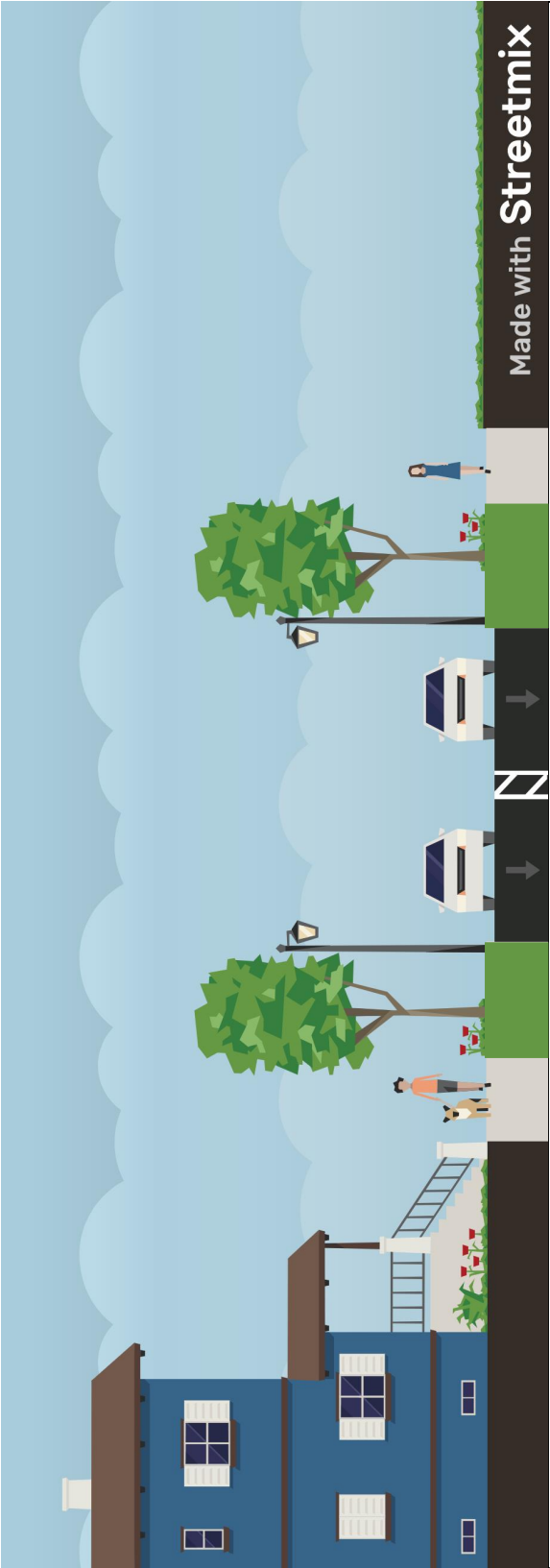


Figure 6: Potential Improvements for missing sidewalks (E)

Existing Site Amenity Assessment

MEMORANDUM

To: Erik Aulestia, Torti Gallas + Partners
Timothy Zork, Torti Gallas + Partners

From: Richard Moller, PE
Hannah Becker, PE
Kimley-Horn and Associates, Inc.

Date: May 7, 2025

Subject: Outdoor Site Amenity Areas Assessment

The purpose of this memorandum is to provide a high-level summary of the existing outdoor amenity areas and their condition to identify existing challenges and potential opportunities to be considered during the master planning efforts.

General observations on outdoor amenities:

- Observations noted below are from the November 2023 Town Hall meeting as well as the January 2024 Management Stakeholder Meeting.
- Participants emphasized that Leisure World is an active adult community and that the desired amenities should reflect and support that vision.
- The average age of residents has been continuously increasing. There is a desire to attract younger residents and the amenities should aim to support that.
- There is a desire and need for more walking trails.
- Areas for outdoor entertainment and gathering space are desired.
- Outdoor amenity areas are spread across the campus and not in one central location.
- There are no playgrounds on-site, which is desired by some of the residents for visiting grandchildren.

Amenity Space 1: Tennis/Pickleball Courts

Description

- Facility currently has 4 pickleball courts and 3 tennis courts.
- Feedback from the community shows that changes are needed due to increase demand and interest in pickleball.
- Younger residents have increase interest in pickleball.
- Interest in having separate pickleball and tennis facilities to avoid conflicts between players of the two sports.

Amenity Space 2: Community Garden Area

Description

- Residents can reserve a plot to plant their own gardens.
- Gardens are in good condition and well maintained.
- Currently all located within one area and not close to all mutuals which means most users must drive and park.
- Explore option to add plots at multiple locations closer to mutuals.

Amenity Space 3: Golf Course and Trails

Description

- Existing 18-hole golf course located at the center of the community. Golf course is well maintained with mature trees, ponds, and cart paths.
- Sentiment from the community is that Golf is a differentiator and drives value.
 - If reduced in size, possible legal issues from residents who paid extra for “golf view” units.
 - More rounds of golf and more revenue generated over the past few years.
 - ±22,000 rounds of golf last year (compared to 30,000 rounds capacity).
 - Conflict between walkers and golfers
 - Allowing early morning walkers on course cuts off valuable tee times that would lead to increased rounds played. Walkers are permitted on the course until 8:30 am.
 - In the afternoon around 5:00-5:30 people walk in the middle of golfers still playing.
- Explore opportunity for a dedicated circumferential walking path that does not conflict with golf course.

Amenity Space 4: Bocce Ball and Shuffleboard

Description

- This amenity is not heavily utilized.
- Explore option to reduce size or relocate to make room for other amenity areas near Clubhouse 1.

Amenity Space 5: Lawn Bowling

Description

- This amenity is not heavily utilized.
- Explore option to remove to make room for other amenity areas near Clubhouse 1.

Amenity Space 6: Pool

Description

- Outdoor Pool with outdoor seating (Lanai) area.
 - Pool fence is not up to code, awaiting decision from County on exemption. May need to rebuild well/fence.
 - Opportunity to build a new outdoor pool and convert the existing sunken pool into an amphitheater.
 - Outdoor entertainment space is important.

Amenity Space 7: Magnolia Park and Picnic Area

Description

- Outdoor Park with mature trees, landscaping, walking paths, picnic areas and grills.
- Currently no parking to access.

Amenity Space 8: Fairways South Lake/Park Area (Part of Fairways Mutual)

Description

- Small lake with park areas and a deck over the water located within the Fairways South Mutual.
- Sidewalk for Leisure World Blvd. meanders around lake with a few seating areas.

Amenity Space 9: Daffodil Park Space

Description

- Small park with mature trees, walking paths, and seating areas.
- There is an open area across Leisure world Blvd., adjacent to the main gate, that is currently not utilized as park space.

Amenity Space 10: Mutual Walking Paths (Not on Trust Property)

Description

- Walking paths located within Montgomery Mutual and Mutuals 9, 10 and 13.
- Paths are inconsistent withs, materials, and lack wayfinding.
- Explore opportunity to integrate these into a larger walking path network for the community under a shared maintenance agreement.

Amenity Space 11: Pollinator Park Space

Description

- Small park with mature trees, landscaping and seating areas.

Amenity Space 12: Veterans Park

Description

- Small park located at the ellipse area in front of Clubhouse I. Park has cascading fountains, ornamental trees, and lush landscaping. It is well maintained.

Stormwater Management Assessment

Leisure World

STORMWATER MANAGEMENT ASSESSMENT

May 7, 2025

1.0 Executive Summary

The re-envisioning of Leisure World creates an opportunity to enhance stormwater management on the site. The adequate management of stormwater is necessary to reduce stream channel erosion, pollution, siltation and sedimentation, and to address localized flooding. There are various strategies that could be implemented into the design of the potential development sites identified as well as the outdoor amenity areas and open spaces. There are various structural and non-structural facilities known as Best Management Practices (BMP's) that can be incorporated into the design. These BMP facilities will need to be designed in accordance with the Maryland Department of Environment (MDE) and Montgomery County standards. Individual projects that generate land disturbance in equal to or larger than 5,000 square feet, will need to obtain approval of a stormwater management plan through Montgomery County Department of Permitting Services (DPS). The stormwater management strategies for new development or open space projects should focus on the following:

- *Reduce Impervious Surface* – Maximize green space and pervious surfaces.
- *Promote Stormwater Infiltration* – Install BMP's that allow for stormwater infiltration that recharge ground water if soils allow.
- *Reduce Runoff Leaving the Site* – Install BMP's that reduce the runoff generated by the site by allowing for evaporation or transpiration. These can include green roofs, bio-retention areas, bio-swales, and rain gardens.
- *Treat Runoff Leaving the Site* – If soils are not adequate for infiltration, install BMP's that filter runoff prior to discharging into natural water ways. These can include sand filters or biofiltration.
- *Control Rate of Runoff* – Install BMP's that temporarily detain runoff and release it at a controlled rate. This prevents downstream erosion of natural water ways and helps mitigate downstream flooding. These can include underground detention facilities or ponds.
- *Incorporate Stormwater BMPs into Building and Open Space Design* – Use environmental site design elements as part of the design of the building and/or open spaces. These can include green roofs, bio-retention planters, rain gardens, and permeable pavers.

Infiltration Trench

BERM FINISHED GRADE

3:1 MAX.

OBSERVATION WELL WITH REMOVABLE WATERTIGHT CAP

6" PVC SOLID PIPE ABOVE FILTER FABRIC

RUNOFF

VEGETATED AREA (FOR PRETREATMENT)

PAVEMENT RUNOFF

12" WASHED PEA GRAVEL NATURAL UNGRINDING #5

6.5' MAX.

1 1/2" - 3" DIA. WASHED AGGREGATE ASTM D-448 SIZE 40

6" SAND

6" PERF. PVC

FILTER FABRIC

UNDISTURBED MATERIAL

CLEAN ASTM C-33 FINE AGGREGATE CONCRETE WASHED SAND

1/2" GALVANIZED STEEL BOLT W/ NUT

18"x18"x1/2" STEEL FOOT PLATE

6" PVC COUPLING

6"x6"x1/2" STEEL PLATE

WELD

NOTES:

1. ALL PVC TO BE SCHEDULE 40. PERFORATIONS SHALL BE $\frac{3}{8}$ " ϕ @ 4" O/C 90° ALL AROUND PIPE.
2. INSTALL REMOVABLE WATER TIGHT PVC CAP ON TOP OF 6" PVC.
3. USE MIRAF140-N FILTER FABRIC OR MCDPS APPROVED EQUIVALENT. DO NOT PLACE FABRIC ON BOTTOM OF TRENCH.
4. BOTTOM EXCAVATION IS TO BE IN NATURAL UNCOMPACTED EARTH.

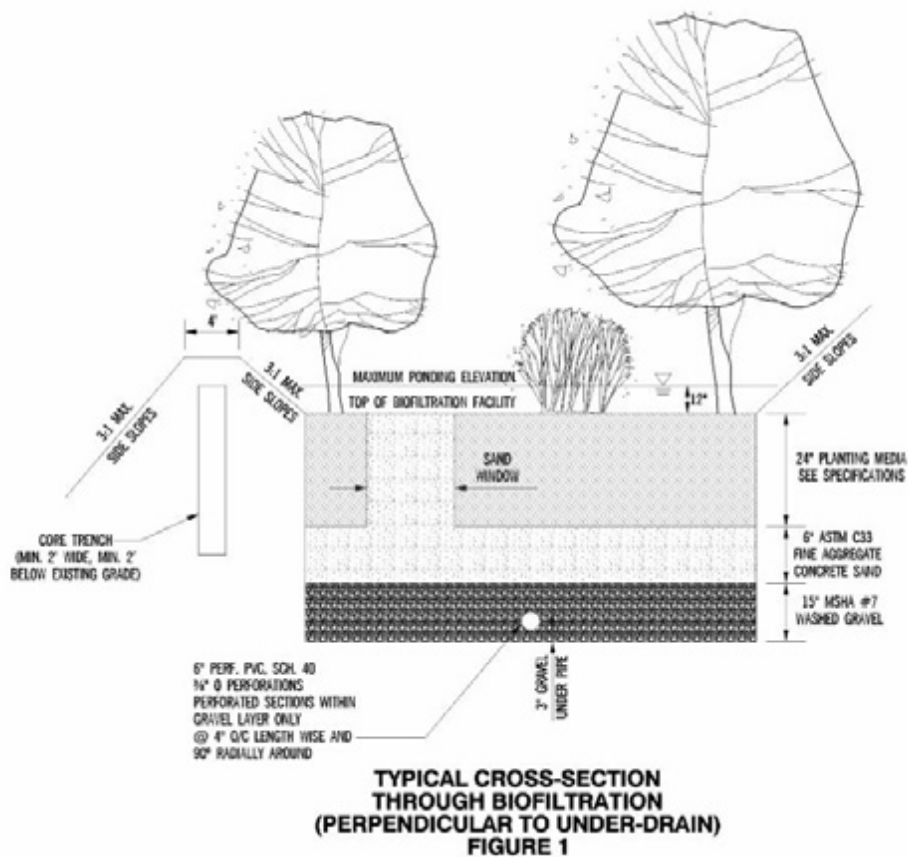
INFILTRATION TRENCH DETAIL

Not To Scale

Source: Montgomery County DPS Stormwater 2005 Management Facility Design Specs

Bio-Filtration Area

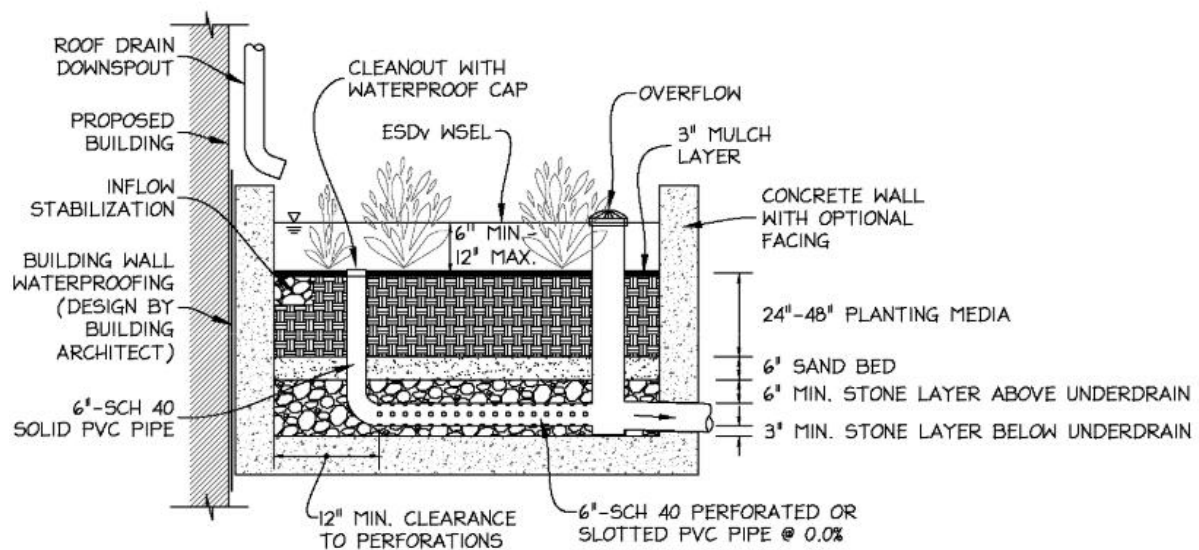
Biofiltration is soil filtration system with multiple layers of media and surface plantings. A perforated underdrain is installed at the bottom where soils don't allow for infiltration. These systems can fit into relatively confined spaces, thus making them well-suited for incorporation with parking lot designs.



Source: Montgomery County DPS Stormwater 2005 Management Facility Design Specs

Micro Bio Retention Area

Micro-Bioretention is a filtration system that treats runoff by passing it through a filter bed mixture of sand, soil, and organic matter. It also contains surface plantings and a perforated underdrain. These are commonly incorporated into open space areas as bio-retention planters.

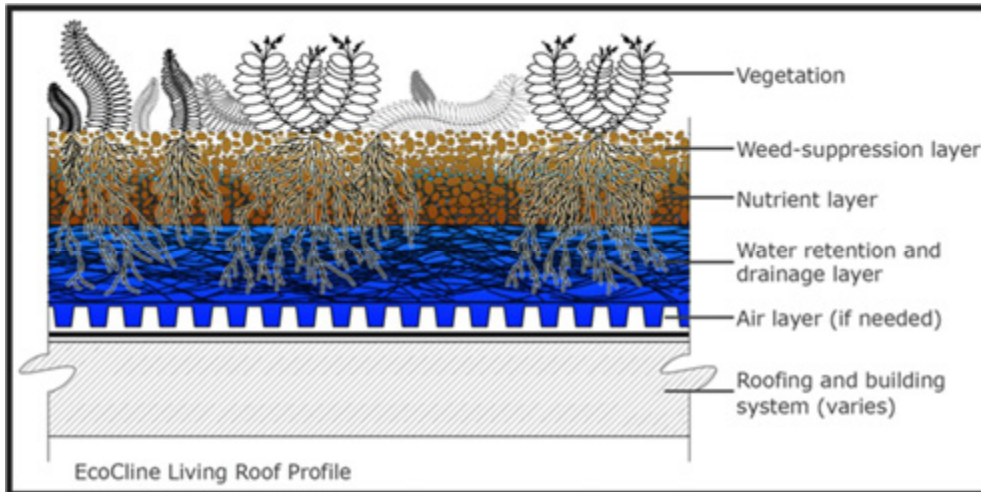


PLANTER BOX MICRO-BIORETENTION
TYPICAL CROSS SECTION
 NTS

Source: Montgomery County DPS Stormwater 2005 Management Facility Design Specs

Green Roof

Green roofs are a vegetated roof systems consisting of vegetation, planting media, retention, insulation, and waterproofing system. These can be incorporated as an amenity to building rooftops. There are various vegetation and planting media depth options depending on the structural design of the building.



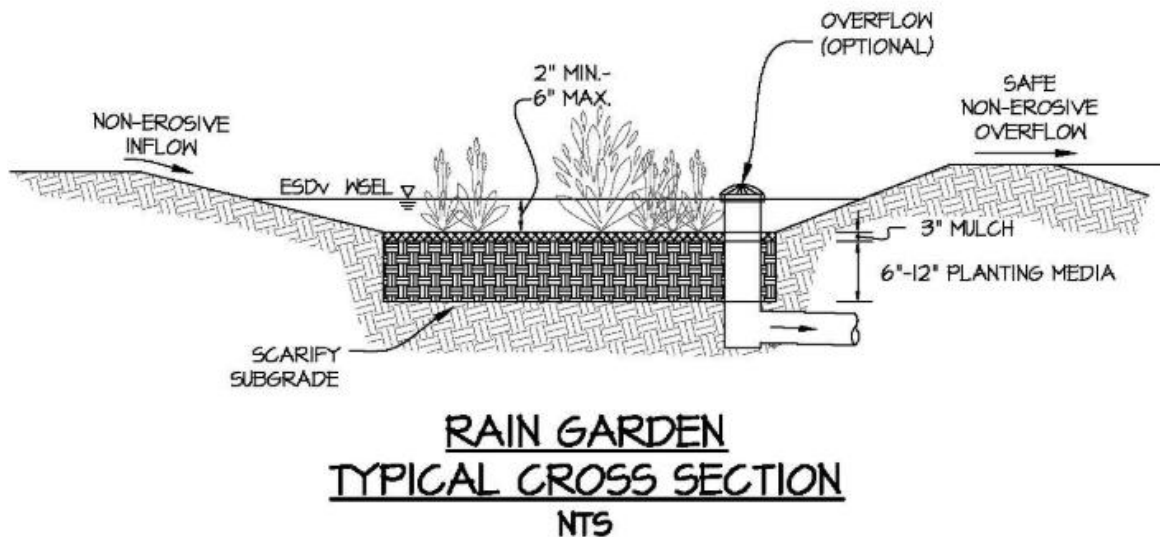
Source: EcoCline Living Roof Profile (2018) <https://furbishco.com/ecocline-green-roof/>



Source: Montgomery County EMOC Green Roof (2012) <https://furbishco.com/ecocline-projects-page/#gkit-popup>

Rain Garden

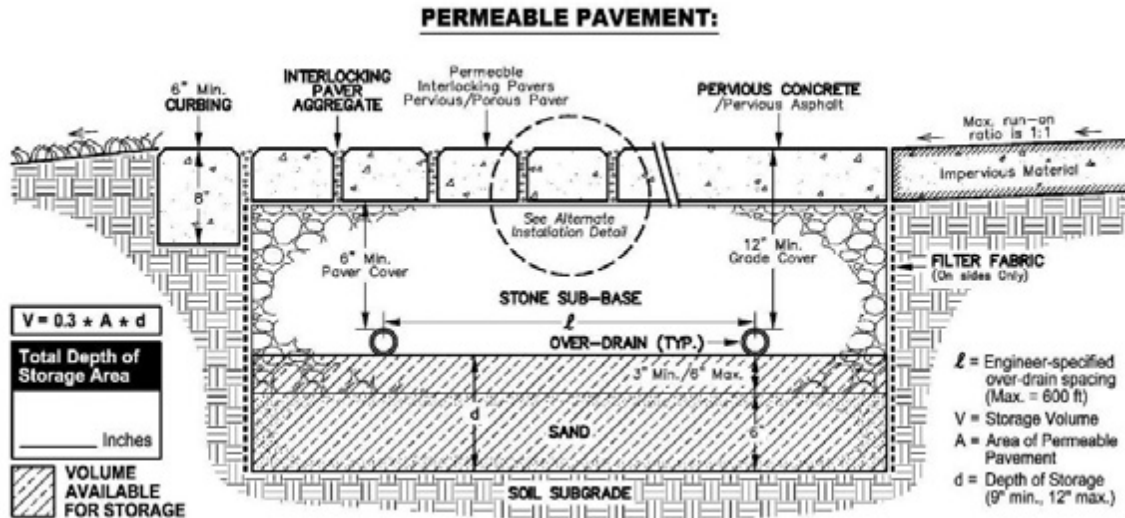
Rain gardens are shallow excavated landscape features that temporarily hold runoff and slowly filter it through a soil bed. They are typically planted with shrubs, grasses, and flowers and can be incorporated into open space areas.



Source: Montgomery County DPS Stormwater 2005 Management Facility Design Specs

Permeable Pavers

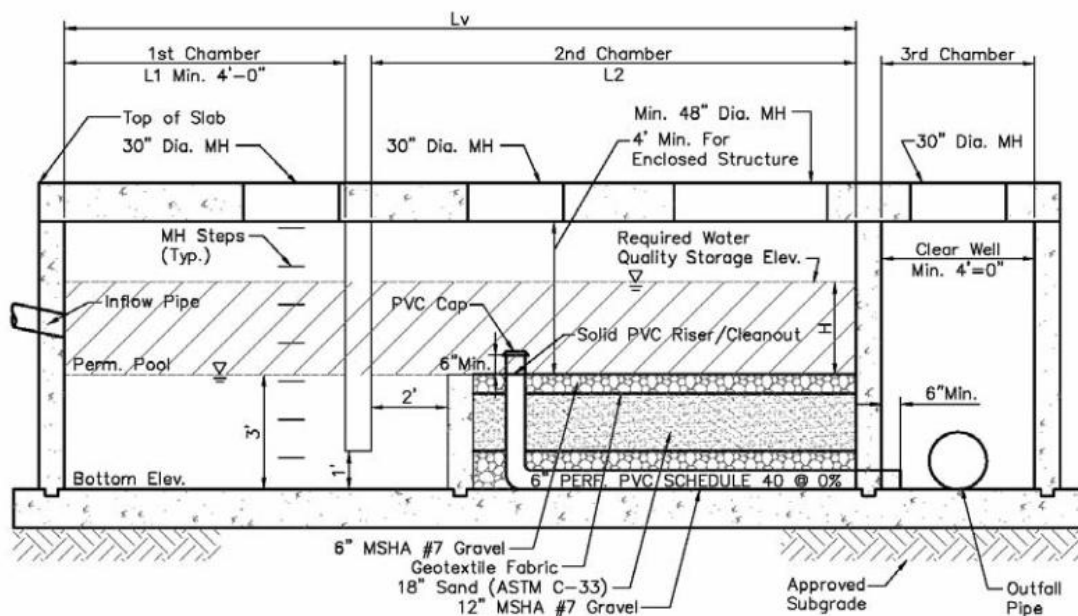
Permeable pavements are alternative surfaces that allow rainwater to either pass through the permeable surface or around interlocking pavers through wider joints. There are multiple layers of stone and sand underneath the pavers as well as a perforated underdrain in cases where soils are not conducive to infiltration. Permeable pavements or pavers can be incorporated into open space areas, trails, and sidewalks.



Source: Montgomery County DPS Stormwater 2005 Management Facility Design Specs

Sand Filters

Sand filters are concrete structures consisting of three chambers, an inflow chamber, a filter chamber, and outflow chamber. These are typically installed under parking areas, roads, sidewalks, or open spaces and take up less surface area than other BMP's. Their use is limited to water quality treatment and are not considered an environmental site design feature.



Source: Montgomery County DPS Stormwater 2005 Management Facility Design Specs

Underground Detention Facilities

Underground detention facilities are systems typically made of underground pipes or concrete structures that temporarily detain runoff and release it at a control rate. These facilities only comply with the quantity control requirements and do not provide stormwater treatment.



Source: Contech Engineering Solutions Brochure <https://www.conteches.com/technical-guides/search?filter=OKZO0V1U70>

Multimodal Transportation Assessment

Leisure World

MULTIMODAL ASSESSMENT

May 07, 2025

1.0 Executive Summary

The purpose of this memorandum is to describe a high-level overview of potential improvements that can be made in the Leisure World Campus to improve everyday travel with the campus. These potential improvements respond to the community perspectives that were shared during the November 2023 Leisure World Town Hall meeting and reflect the consultants' understanding and observations of existing conditions and community needs.

With the goal of improving everyday travel, two focus areas are recognized:

1. The desire for leisure world residents to travel along streets, sidewalks, paths and trails for recreation, health, and to enjoy the campus environments. This represents conditions where travel itself is the purpose.
2. The need for leisure world residents to travel to specific destinations within and beyond the campus using safe, efficient, reliable, and convenient options. This represents conditions where travel supports the true purpose of the trip (i.e., going to the clubhouse, a trip to the grocery, a medical appointment, or to visit a neighbor across campus).

The potential improvements reflect the consultant's opinion and trends at campus serving similar age groups.

2.0 Community Needs and Potential Improvements

The community needs listed below were determined as a result of the November 2023 Leisure World Town Hall Meeting, a site tour with the consultant team, and a review of regional transportation planning documents. Each community need has been paired with a potential improvement or improvements.

Community Need	Improvement
Slower vehicle speeds	<ul style="list-style-type: none"> • Add Raised Intersections at key intersections • Add Curb Extension at Key Intersections • Add Speed Tables at Key Locations • Removal slip lanes at Rossmoor/Leisure World Blvd.
More reliable shuttle to sites within Leisure World or outside of Leisure World (improved routing, longer service hours)	<ul style="list-style-type: none"> • Implement shuttle service that circulates around Leisure World Boulevard (instead of driving to/through mutuals) • Improve bus stops (seating, covered shelters, ADA accessible paths to the bus pick-up/drop-off site) and construct a Transportation Hub • Hire Transportation Managers • Improve On-Demand transit response time
More reliable shuttles or buses to locations outside of Leisure world (longer service hours, increased service coverage area)	<ul style="list-style-type: none"> • Hire Transportation Managers • Improve On-Demand transit to require less advanced notice
Wider sidewalks, paths, and trails	<ul style="list-style-type: none"> • Widen sidewalk/paths, where space is available, to minimum of 10 feet.
More sidewalks, paths, and trails, (especially across the golf course)	<ul style="list-style-type: none"> • Add walking trail through the golf course
A complete sidewalk with no gaps, no sudden end points, and no inconvenient crossing locations	<ul style="list-style-type: none"> • Add Curb Extension at Key Intersections • Add Speed Tables at Key Locations • Complete the sidewalk between Glen Eagles Drive and Westholm Court. Fill in other missing or substandard sidewalks as needed
Bike Lanes or other dedicated space for bicycles or other non-motorized rolling options	<ul style="list-style-type: none"> • Restripe Leisure World Boulevard to include one bike lane on either side of the road
Improved parking lot safety	<ul style="list-style-type: none"> • Restripe Parking lots to clearly show pedestrian walking routes and more logical parking circulation
More paths, sidewalks, and trails for recreation	<ul style="list-style-type: none"> • Widen sidewalk/paths, where space is available, to minimum of 10 feet. • Add walking trail through the golf course
More safe locations to cross the street	<ul style="list-style-type: none"> • Add Curb Extension at Key Intersections • Add Speed Tables at Key Locations • Add marked crosswalks at up three locations
More accessible / Ada Compliant paths, sidewalks, trails, curbs, and parking lots	<ul style="list-style-type: none"> • Add Curb Extension at Key Intersections • Add Speed Tables at Key Locations
More access or connections to the County's sidewalks, trails, paths, and bike lanes.	<ul style="list-style-type: none"> • Coordination with Montgomery County to improve bus service frequency as needed.

3.0 Trends in Campus Travel

This section of the memorandum describes trends in the way people expect to travel in a campus setting similar to leisure world. This memo specifically focuses on trends that make the most sense or Leisure World given its existing and desired future population and activity levels.

Trends Relevant to Master Plan Potential Improvements

Shared Transportation: Shared transportation refers to bikeshare, scooter-share, or carshare service that allow community members to use these specific travel options without the upfront cost of owning them. The main idea behind shared mobility is to provide convenient and efficient travel options for individuals, on an as-needed basis. This can be a low-barrier, low-cost travel option that fulfills periodic or recurring trips. In Montgomery County, Capital Bikeshare is an example of shared transportation. Leisure World could work with a private provider to place a small number of shared bikes, scooters, and cars in the community for the use of residents.

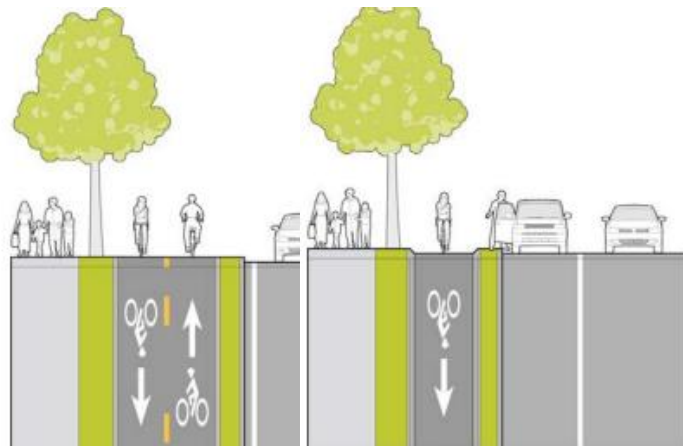
On-Demand Transportation: On-demand transportation refers to transportation services that can be requested as-needed. On-demand transportation offers convenience and flexibility and could allow residents to access transportation without the need of pre-booking or having to plan around a pre-set schedule and route. An example of an on-demand transportation service would be a resident requesting a ride to a doctor's appointment, the ride showing up within a short time period (under 15 minutes from the time of request), being dropped off exactly at their destination.

Personal Electric Vehicle / Charging Infrastructure: Electric vehicles (cars and e-bike or e-scooters) are becoming more popular and affordable, especially for short(er) distance trips. To support and embrace these vehicles, campuses are offering convenient no or low-cost electric vehicle charging stations.

Transportation Hubs: Transportation hubs are locations where transportation connections occur. They are locations where a resident could, for example, ride a bike, park it securely, and then hop on a shuttle to get to their final destination. Or a location where a resident could walk, sit/cool off in a shaded or air-conditioned area, and then rent a shared bike or seated scooter for a leisurely trip around the campus. Well-designed transportation hubs encourage people to try and transfer between different ways of traveling (such as busing, driving, bicycling, rolling and walking). Transportation hubs in campus settings also often feature a range of amenities and services, including access to rentals, climate-controlled waiting areas, bike racks or storage, ample parking, wi-fi, and access to travel information so residents can plan their trips and understand what travel options are available to them.

Bike Lanes/Cycle Tracks/ Separated Bikeways: A bike lane is a dedicated space in the roadway for bicycle use. Bike lanes are often designed with a solid white line that separates bikes from cars

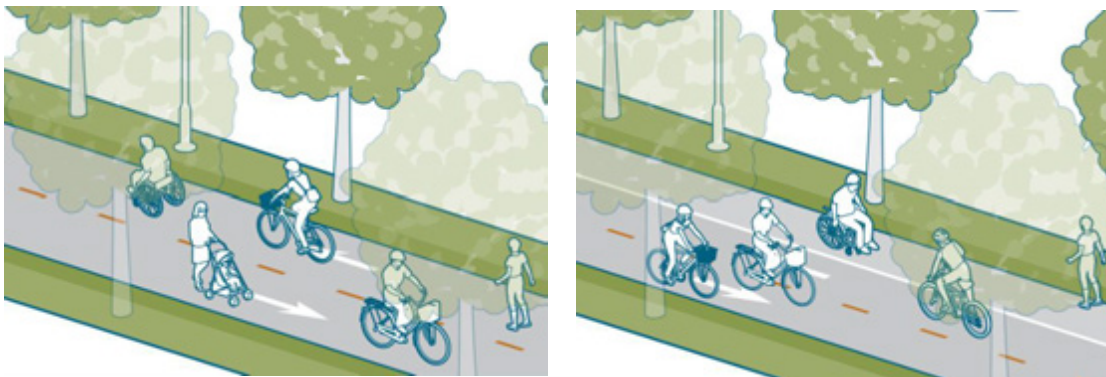
A separated bikeway provide a physical separation between bikes and cars. Two types of separated bikeways are protected bike lanes and cycle tracks.



A protected bike lane adds physical objects such as bollards or parked cars to reinforce the separation between bikes and cars. A cycle track takes separation one step further by moving bikes off the road entirely and creating separate space for bikes on the sidewalk.

Each level of separation is designed to help residents feel safer and more comfortable using their bikes in an environment where cars are present. The goal of a separated bikeway is to create a more inviting, protected, and predictable cycling experiences. The benefit to the campus is that they create the conditions for more people to want to try bicycling.

Shared Use / Multiuse Paths / Sidepaths: A multiuse path, also known as a shared-use path or multi-purpose trail, is designed for use by multiple types of travel, including walking, biking, and rolling in a wheelchair, or using a manual or automated, but low speed personal mobility device. These paths are separated from cars and are usually designed to be wider than standard sidewalks. A wide multiuse path creates enough space to so that all users can share comfortably and so that faster moving travel can move around slower or more recreational travel. In Leisure World, these paths could be found along roadways, across the golf courses, or in other designated open spaces. Multiuse paths provide a safe and accessible route for direct transportation to a destination and for recreational travel, as well as promote opportunities for health and physical activity.



Sidepath Design Formats

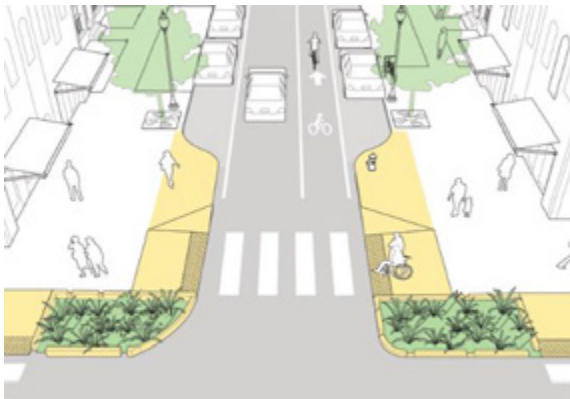
Source: https://montgomeryplanningboard.org/wp-content/uploads/2017/07/REVISED_Bicycle-Facility-Design-Toolkit-6.30.17-reduced.pdf

Transportation Managers: Transportation managers are responsible for developing or advertising and programs and services to support older adults' travel needs. Transportation managers can assist residents in finding the right way to travel, understanding the costs, and scheduling as-needed transportation.

Traffic Calming: Curb Extension and Raised Intersections:

Curb extensions visually and physically narrow the roadway at intersections, creating safer and shorter crossings for people walking and making them more visible to people driving.

Raised intersections create safe, slow-speed crossings at intersections by raising the road level to flush with the sidewalk. This makes it easier for older adults to move through the intersection on foot and slows cars down as they move through intersections. Raised intersections are especially useful in senior communities because it makes pedestrian more visible to on-coming motorists and removes the need to step up/step down from a curb to cross the street.



Curb Extensions and Raised Intersections
Source: NACTO

Other Travel Trends

Golf Cart / Neighborhood Electric Vehicles: The use of golf carts or other personal neighborhood scale electric vehicles on-road in general traffic or in specific lanes. In some communities with wider sidewalks, paths, or trails golf carts can share space with people walking or riding their bikes.

Street Closure / Pedestrianization Street closures or pedestrianization of a street, close a street to vehicles (except emergency vehicles) and open up the entire street for the use of people walking, biking, and using low-speed motorized devices. Closed streets can retain the existing curbs or can be redesigned to be curbless. Closed streets usually include narrower roadways, textured pavement, and landscaping to encourage slower speeds and increase awareness and interaction.

4.0 Potential Improvements for Leisure World

Based on the existing conditions of Leisure World and an understanding of industry trends, the following are recommended potential improvements that can be integrated into the master plan.

4.1 VEHICULAR ACCESS AND FLOW RECOMMENDATIONS

To improve vehicular access and flow getting into and out of Leisure World, it is recommended to improve gateway intersections with traffic calming elements such as raised intersections or curb extensions. This will reduce the overall footprint and size of these intersections such as the intersection of S. Leisure World Boulevard and Rossmoor Boulevard. Slip lanes, which are designated lanes on a road that allow vehicles to turn without stopping at a stop sign or signal may be removed in order to extend the curbs. This will shorten the distance pedestrians need to cross the street. A traffic study will be needed to confirm these recommendations. ***Implementing these vehicular access and flow recommendations directly addresses the following concerns identified in Section 2.0:***

- Slows down vehicle speeds
- Increases awareness of pedestrians in the roadway
- Adds additional marked and highly visible crossing locations for pedestrians
- Improves ADA Compliance through a complete redesign of intersection elements
- Improved connectivity to the greater Montgomery County Walk, Bike, and Transit Networks



4.2 SHUTTLE AND ON-DEMAND TRANSPORTATION RECOMMENDATIONS

Circulation shuttle services should be considered to supplement the existing shuttle service. This would provide continuous shuttle service running in both directions along the full loop of Leisure World Boulevard to bring residents to key destinations such as Clubhouse I/II, Glen Eagles Drive, Connective Avenue, and Norbeck Boulevard. The circulating shuttle would only stop along Leisure World Boulevard to increase efficient, direct, and faster service to residents. The existing shuttle service will continue to service bus stops within each mutual. A circulation shuttle would provide residents with additional transportation options with less time waiting between shuttles.

In addition to supplemental shuttle services, it is recommended to develop higher capacity, covered shuttle stops that have seating and additional amenities. This will likely draw more users to the transit system and will enhance the overall experience.

It is recommended to improve the responsiveness of on-demand “point-to-point” transit through the integration of on-demand transportation services. 4-hours advanced notice, as is the current practice for a wheelchair/scooter accessible van, is too long and not conducive for short, impromptu trips. An integrated mobility strategy should be able to provide travel options within 30 minutes or less. A full-time mobility manager and support staff may be able to develop these policies and programs and support users with on-demand transit. If this is not financially viable for Leisure World to manage or subsidize, additional partnerships and strategies should be explored to encourage and support private rideshare and micromobility.

Implementing these transit recommendations directly addresses the following concerns identified in Section 2.0:

- Creates more reliable transit options within Leisure World



4.3 PEDESTRIAN AND BICYCLE RECOMMENDATIONS

It is recommended to complete the sidewalk or sidepath network along the north side of Glen Eagles Drive and the west side of Leisure World Boulevard between Glen Eagles Drive and Westholm Court to provide more opportunities for walking or biking throughout Leisure World. Furthermore, the development of dedicated walking/rolling pathways through the existing or reduced golf course area to reduce the walking distance between Clubhouse I and northeast Leisure World properties should be considered. This pathway can be promoted as a health/wellness loop. These recommendations would be constructed to provide appropriate widths and grades to satisfy standard requirements as necessary.

Additionally, marked crosswalks across Leisure World Boulevard should be added to reduce the distance someone must walk to safely cross the street. There are at least three locations that have been identified: Leisure World Blvd and Interlachen Dr/Forrest Edge Dr, Leisure World Blvd and Hyde Park Dr, and Leisure World Blvd and Elkridge Way.

Implementing these pedestrian and bicycle recommendations directly addresses the following concerns identified in Section 2.0:

- Wider pathways for active use (walking, biking)
- More pathways for active use (walking, biking) with emphasis on pathways across the golf course
- Complete sidewalk network (i.e. fill in missing gaps along Leisure World Boulevard and Glen Eagles Drive)
- Dedicated facilities (on- or off-street) for biking
- Facilities that focus on both recreation and transportation/commutes
- Additional marked and highly visible crosswalk locations
- Improved ADA Compliance (curb ramps, walkway slopes, clear widths/access for mobility assistance devices)



4.3.1 Potential Leisure World Boulevard Redesign

Leisure World Boulevard today has two very wide travel lanes, a raised median, and on-street park in some sections. The wide lanes contribute to faster travel speeds and longer crossing distances for people walking.

Existing Leisure World Boulevard



Pros:

Wide travel lanes can accommodate on street parking, transit shuttles, and emergency vehicles

Sidewalks along Leisure World Boulevard already exists

Space available for on-street parking

Cons:

No existing bicycle facilities

Five-foot sidewalks do not provide space for fitness/recreational users as well as walkers/commuters

More space is provided for vehicles compared to people

Option 1:

One recommendation is to consider restriping Leisure World Boulevard to reallocate space from vehicle lanes to parking and bike lanes. This change can be accomplished without making costly changes to existing curbs and would create more parking along Leisure World Boulevard



Pros:

- Narrow travel lanes reduce vehicle speeds
- Space is allocated to multimodal users
- Cost-effective compared to behind-the-curb improvements
- Suitable for all ages and skill levels
- Creates more on-street parking potential along the entirety of Leisure World Boulevard
- Protects bicycles by placing them between parked vehicles and the curb

Cons:

- There is no vertical separation between bicyclists and vehicles, increasing the risk of interaction with vehicles
- Potential conflicts with pedestrians crossing the street
- Distance required to cross the street is the same as existing conditions

Option 2:

The street could be restriped in certain locations to remove or consolidate on-street parking and add wider on-street bicycle lanes on one or both sides of the street. As an example, the street could alternate between on-street parking with shared lane markings and on-street bicycle lanes depending on the amount of space that is available.

Based on a desktop review of Leisure World Boulevard, the following sections were identified to maintain on-street parking capabilities while the remaining portions of Leisure World Boulevard were identified to remove parking to create space for bicycles.





Cross section with parking along the inner loop

Pros:

Narrow travel lanes reduce vehicle speeds

Space is allocated to multimodal users

Cost-effective compared to behind-the-curb improvements

Suitable for all ages and skill levels

Maintains on-street parking potential along specific segments

Cons:

There is no vertical separation between bicyclists and vehicles, increasing the risk of interaction with vehicles

Potential conflicts with pedestrians crossing the street

Distance required to cross the street is the same as existing conditions

Potential conflicts with bicyclists and vehicles during shared segments

The above concepts can be explored across the entire length of Leisure World Boulevard with specific accommodation to maintain on-street parking and to account for turning radii of emergency vehicles and shuttles.

Examples of a restriped Leisure World Boulevard are shown on subsequent pages.



Nested Parking with On-Street Bicycle Facilities

In areas where on-street parking is desired, and parking is not nested, the on-street bicycle facility will transition into a sharrow, allowing bicycles to share the road with vehicles momentarily. The following figure demonstrates how a potential transition may look. Additional studies and design will be required should this option be selected.



On-Street Parking with Sharrows

5.0 Transportation Impacts on New Development

Based on information provided by Torti Gallas on four potential redevelopment sites (as shown below), high-level parking and vehicle trip generation calculations were developed to determine the resulting transportation impacts. Calculations were developed for discussion purposes and all information, assumptions, and conclusions are subject to additional traffic and parking studies.



All four redevelopment sites have the potential to generate pedestrian, bicycle, and vehicle activity, which may result in additional parking demands and traffic. However, it is important to note the activity generated at these sites (and within Leisure World in general) will not be the same as activity generated outside of Leisure World. Since this is an active adult community, where residents are not likely to travel at the same time to the same place, like a morning commute to an office building, the traffic and parking demand is not anticipated to result in congested conditions. Furthermore, as an active adult community, it is likely that many residents will choose alternative transportation modes to commute across campus, such as biking or walking. If the proposed transportation improvements outlined in this memorandum are implemented, the number of Leisure World residents traveling by alternative modes will likely increase, therefore further reducing anticipated parking demand or traffic.

5.1 TRAFFIC & CONGESTION

Using the ITE Trip Generation Manual, 11th Edition, trips were estimated by each of the development alternatives, as shown in the table below. The average rate for Land Use Code 252 (Senior Adult Housing - Multifamily) was used to estimate trips during the highest trip-generating peak hour. Since the peak hour of Leisure World does not follow the typical peak hour of adjacent street traffic, the peak hour of the generator was used for trip generation. The peak hour of the generator resulted in a more conservative estimate than the peak hour of adjacent street traffic.

Development Option	ITE Trip Generation Rate	Trips Generated	Entering Trips (vehicles)	Exiting Trips (vehicles)
A	0.29	50	23	27
A2	0.29	58	27	31
B	0.29	74	34	40
C	0.29	103	47	56
D	0.29	67	31	36

Option A redevelops the existing Clubhouse I Parking lot into a multi-use area. Option A1 adds 170 units near Clubhouse 1, compared to 0 currently while option A2 adds 200 units near Clubhouse 1. Option A has the potential to add between 50 and 58 additional trips generated based on industry standard trip generation rates.

Option B redevelops Mutual 7 to improve the image and perception of Leisure World. This option adds 260 and has the potential to add 74 additional trips generated during the peak hour.

Option C reconfigures a portion of the golf course into a multi-use open space with amenities and recreational opportunities. It also includes housing opportunities. Option C adds 352 dwelling units, which has the potential to add an additional 103 vehicle trips during the peak hour.

Option D reconfigures the existing site to include additional housing opportunities. Option D adds 230 dwelling units, which has the potential to add an additional 31 vehicle trips during the peak hour.

The densest development option, C, will only result in a peak of 103 trips which is less than two cars a minute. The estimated peak hour entry and exit traffic is expected to be accommodated by the existing travel lanes along Leisure World Boulevard. This number of added cars during the peak hour is not likely to cause adverse impacts on the transportation network.

If Leisure World Boulevard were redesigned to accommodate bike lanes, any adverse traffic impacts of additional development could be offset.

Any congestion that does currently exist in Leisure World is limited to the gateways, such as at Norbeck Gate. Per a traffic study at Norbeck Gate (completed in 2023), any congestion was a result of a visitor who required additional time to gain access to Leisure World. Improvements to inbound access, such as relocating the guardhouse further into Leisure World or adding an additional lane for residents to bypass the guard house would potentially reduce this congestion.

The recommendations outlined in the 2023 Norbeck Gate traffic study should be implemented to potentially mitigate the concerns at Norbeck Gate. Furthermore, the Norbeck Gate study also considered closing the intersection of Tarkington Lane and Norbeck Boulevard but did not recommend due to potential safety concerns should access be restricted on Fitzburgh Lane. The Kimley-Horn team concurs with the findings of the Norbeck Gate traffic study and recommends improvements to be implemented.

Based on industry standards, the capacity of an id check lane (using manual identification methods) is 300 to 450 vehicles per hour. This would apply to the visitor check lane. The capacity of a resident entry lane (assuming automatic identification) is 550 to 800 vehicles per hour per lane. Separating visitor and resident access will allow residents to flow into the site more efficiently. It is not anticipated that entering traffic will approach capacity during peak times.

5.2 PARKING DEMAND

Using the ITE Parking Generation Manual, 5th Edition, parking generated (or parking spaces required) at each site was calculated. This estimate was calculated based on the dwelling units for each redevelopment using a parking rate developed for Senior Adult Housing (Land Use Code 252). This land use consists of attached independent living developments, including retirement communities, age-restricted housing, and active adult communities. Additional calculations for required parking spaces were also completed using parking rates per Montgomery County Zoning ordinance. For the purposes of this calculation, dwelling units were estimated to be all 2-bedroom units. The table below compares the parking spaces provided by the sites; parking generated using ITE Parking Generation rates and required parking spaces calculated using Montgomery County Parking ordinance rates.

Development Option	Dwelling Units	Parking Provided	ITE Parking Rate	Parking Required	Montgomery County Parking Rate	Parking Required
A1	170	605	0.61	104	0.75	128
A2	200	640	0.61	122	0.75	150
B	255	438	0.61	156	0.75	192
C	352	570	0.61	215	0.75	264
D	230	384	0.61	141	0.75	173

The amount of parking provided in the redevelopment options more than satisfies the parking generated using the ITE parking rates and Montgomery County Parking rates. The provision of additional multimodal facilities throughout Leisure World will further reduce parking demand by shifting vehicle trips to bicycle, walking or shuttle trips.

5.3 ADDITIONAL CONSIDERATIONS

Additional demand at sites A/B and C, may increase traffic near the Georgia Avenue and Norbeck Road gates, respectively. This is not anticipated to create congestion, but the increased presence of vehicles at these intersections may increase the risk for vehicle and bicycle/pedestrian conflicts if appropriate multimodal facilities are not implemented.

Any additional demand increases at the entry and exit gates could be addressed through additional/separate lanes for resident and visitor access.

Increased demand at all sites also warrants any cross-campus multimodal improvements, particularly a sidewalk or sidepath network along Glen Eagles Drive, as mentioned earlier in this memorandum.

Recreation Needs Assessment

LEISURE WORLD OF MARYLAND **MASTER PLAN FOR TRUST PROPERTIES**

Leisure World

RECREATION NEEDS ASSESSMENT

May 7, 2025

1.0 Executive Summary

The re-envisioning of Leisure World creates an opportunity for the community to explore new recreation opportunities, incorporate trends in recreation, and identify future needs. Incorporating methodology to identify community needs and priorities, site program recommendations have been developed based upon findings from a needs assessment analysis. The needs assessment uses three (3) techniques: quantitative research, qualitative input, and observation evaluations. Recommendations, included at the end of this report, represent a balance between the findings of all three needs assessment techniques. Recommendations are intended to assist the community in the decision-making process and do not represent requirements.

The first step included quantitative research consisting of a high-level Facilities Level of Service (LOS) analysis which measures the provision of recreation facilities and amenities on a population-based analysis. Additionally, review of national recreation and sport participation rates. Attention to participation data for active adults and seniors was emphasized.

Qualitative research included a series of input from residents gathered during Town Hall in November 2023 and received from Community Management during a stakeholder meeting in January 2024.

Observational research included an overview of national and state recreation trends with relevance to existing amenity types and active adult communities. Recent trends in the provision of recreation by entities have given rise to the following focus areas:

- *Increasing Demands* – Ever increasing facility, program, and service demands.
- *Aging Facilities* – Built in the mid-1960s, Leisure World's open spaces and recreation facilities are older and have a continued need of being renovated or replaced.
- *Inclusiveness* – Meeting the needs of different ethnic groups, economic status, age, and ability.
- *Safety and Security* – Providing open space and recreation facilities that are safe and secure can be an on-going issue.
- *Cost Effectiveness* - A need for open space and recreation facilities to be more cost effective in their development and operations.

- *Measurable Outcomes* – A strong need to be able to quantify the results and benefits of the programs and facilities that are provided. Establishing well defined levels of service (LOS) are critical.

Recreation facility, park, and open space program recommendations include the following:

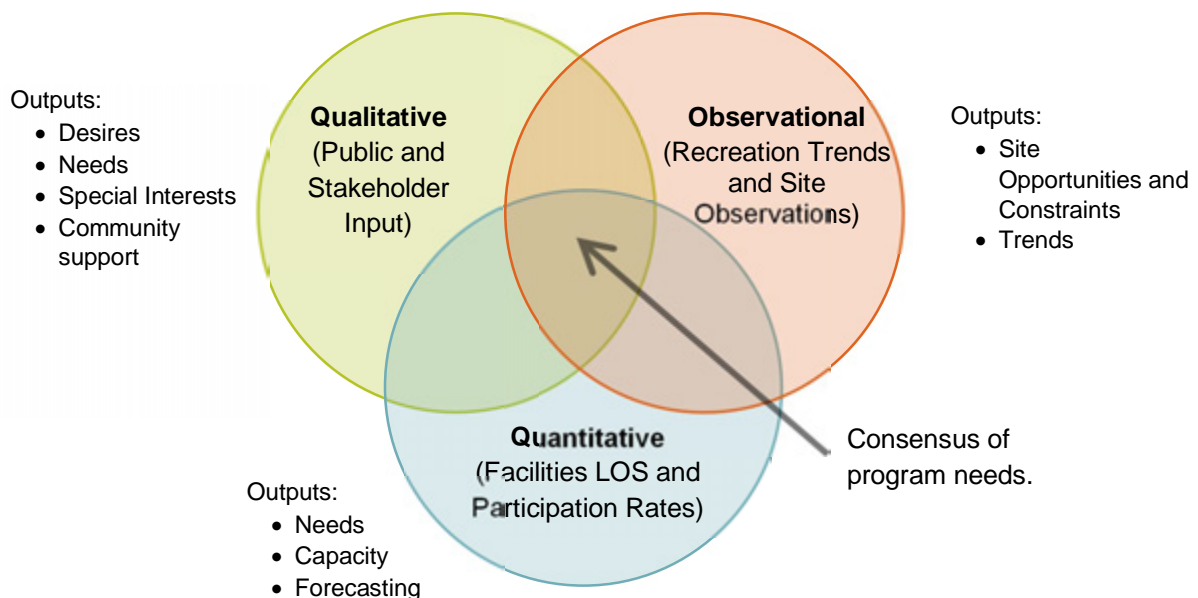
- Additional four (4) pickleball courts and two (2) to four (4) tennis courts for designated use.
- One (1) playground, centrally located and accessible.
- One (1) dog park with potential for a dog run on roof top or parking structure.
- Redevelopment of existing outdoor pool to consist of a recreation pool, lap lanes, a therapy pool, with pool deck programmable space.
- Establishment of trail standards and hierarchy of trail types to include off-street and on-street facilities.
- Reconfiguration of existing 18-hole golf course into an executive 9-hole course.
- Redevelopment of a portion of existing golf course into a naturalized area for passive recreation uses such as birdwatching, walking/hiking and outdoor programs such as painting, photography, yoga and tai chi.
- Development of community garden spaces in smaller clusters more accessible to residents.
- Development of outdoor fitness stations along trails or walking paths.
- Development of shaded seating social spaces within parklets and pocket parks.

2.0 Analysis Methodology

The planning of parkland, recreation facilities, and open space begins by identifying community needs or gaps in services, and priorities. Once these items are identified, a recommendation for site program can be developed that includes a list of amenities, uses, and facilities. The planning process follows a comprehensive process (see **Figure 1**) to identify community recreation demands, supplies, priorities, and site opportunities and constraints. The methodology included quantitative research, qualitative input, and observational evaluations in a research process known as a triangulated, mixed-methods technique. Where results overlap from research techniques, consensus of program needs can be extrapolated.

This memorandum highlights key findings from each method such as Facilities Level of Service (LOS) and recreation trends, as well as qualitative input from community members and stakeholders. Findings from this assessment should be considered as a starting point that will inform the recommendations for recreation and open space. The recommended program will be further evaluated against design and engineering constraints, budget, and additional stakeholder and resident input.

Figure 1: Comprehensive Needs Assessment Process Diagram



3.0 Quantitative Research

Facilities Level of Service (LOS)

The purpose of a Level of Service (LOS) Analysis is to quantify a community's needs for recreation facilities through an allocation measurement. This is combined with other methods to ensure equitable distribution of recreation resources to meet the needs of the community.

In essence, a Facilities LOS measurement builds upon the principle that every resident should have similar opportunities to use recreation facilities. On a comparative level, the number of facilities measured as units per 1,000 population can be benchmarked for a defined area. It is this comparison measurement which provides information as to whether there is a surplus or need in the number of units of recreation facilities within the service area.

Figure 2 identifies LOS measurements for Leisure World as noted in the Needs Assessment. In comparison to national averages provided by the National Recreation and Parks Association (NRPA) Agency Performance Review (2023), the following list summarizes the key findings based upon an estimated population of 8,975 for Leisure World. It's important to note that Facility LOS does not factor participation rates and how various age groups may represent higher or lower usage or demand for specific recreation facilities.

- National average for acres of parkland is 13.0 acres per 1,000 population based upon similar communities. For Leisure World this would be 116.67 acres.
- Leisure World currently provides three (3) tennis/four (4) pickleball courts for use averaging one (1) dual-use court per 2,991 population. Nationally the average is one (1) tennis court per 2,805 population and one (1)

Key Quantitative Takeaways:

- Acreage LOS indicates an overall need for 116.67 acres of parkland and open space based upon current population. This acreage figure would increase if density and overall population increases.
- Facility LOS analysis indicates a minimum need for one (1) sport court (tennis/pickleball) and potentially as many as two (2) pickleball and four (4) tennis courts based upon participation rates.
- Facilitate LOS indicates additional recreation facilities such as up to two (2) playgrounds, three (3) outdoor basketball courts, and one (1) dog park may be needed.
- National participation rates indicate growth in participants for yoga and Pilates, elevated growth for birdwatching and tennis, and exceptionally high growth for golf simulation and pickleball.
- All racquet sports have experienced growth in last 3+ years.
- Exercise walking (54%), swimming (11.8%), and golf (8%) have the highest participation rates among seniors for existing recreation opportunities.
- Approximately 2% of senior households play tennis or pickleball.
- Pickleball (50%+) and tennis (100%+) have higher participation rates for seniors than average households.

pickleball court per 3,252 population. This indicated a potential shortage of one (1) dual-use court.

- Considering that participation levels are nearly 50% for pickleball and 100% for tennis higher for senior households than the average household nationally, the demand for additional courts is likely much higher for residents at Leisure World.
 - Demand for pickleball courts may be as high as four (4) additional courts.
 - Demand for tennis courts may be as high as four (4) additional courts.
 - See recreation trends information regarding dual striped pickleball and tennis courts.
- Though Leisure World is an age restricted community, additional family-oriented amenities are frequently included in 55+ communities such as playgrounds, dog-parks, and basketball courts. National averages for Facility LOS:
 - One playground per 5,816 population; Leisure World currently does not provide any playgrounds.
 - One basketball court per 3,279 population; Leisure World currently does not provide any outdoor basketball courts.
 - One dog park per 11,100; Leisure World current does not provide a dog park.

Recreation Participation Rates

Trends in recreation, in addition to population-based measurements, should be considered when identifying future programming needs for parks. Two (2) industry standard sources for trend data were analyzed: *Sport & Fitness Industry Association (SFIA): Sports, Fitness, and Leisure Activities Topline Participation Report for 2023*; and *National Sporting Goods Association (NSGA) Sports Participation Lifecycle Demographics (2023)*.

Both resources provide insight into which activities are most popular by age group and which are growing in popularity from industry leading organizations. An important note is that the 2023 edition of both reports include impacts to recreation participation highlighted during COVID. Understanding how trends have been impacted by the pandemic is vital to long-range planning and are included in this analysis.

SFIA Topline Participation Report 2023:

In general, the nation participation rate in sports and fitness activities continued to increase to 77.6% of all US residents over age six (6) in 2022. Though the national participation rate increased, activity rates by sports category* have experienced more fluxuation between 2017-2022, with racquet sports (+23%) and outdoor sports (+12) leading increases and individual sports (-10%) declining. Other

sports categories such as fitness (+3), team sports (+2.6%), and water sports (+4.3%) experienced more modest growth. Additional highlights relevant to Leisure World include:

- Yoga (+10.4%) and Pilates (+11.6%) were the top increasing fitness sports in the last three years, while weight/resistance machines (-17.1%) experienced the largest decline.
- Trail running (+20.5%), golf driving range/indoor simulator (+56.9%) had the largest increase in participation for individual sports, while bowling (-6.8%) declined.
- Tent camping (+32.8%), birdwatching (+23.4%), day-hiking (+19.9%), and road bicycling (+10.6%) experienced significant increases in participation since the impacts of COVID-19.
- Pickleball (+158.6%), tennis (+33.4%), cardio tennis (+12.4%), and badminton (+6.5%) experienced the largest increases while all racquet sports increased in participation figures in the last three years.
- Recreational kayaking (+19.1%) had the greatest level of growth for water sports, while canoeing and snorkeling had the greatest number of participants.

Historic participation levels provide an insight of past trends, while analyzing the sports and activities that non-participants would like to participate in can provide insight into future trends. Whether impacted by barriers to participation such as lack of access to facility, lack of programming, no transportation access, etc., **Figure 3** illustrates the top activity each age group aspires to participate within the next 12 months.

- For the 65+ age group; fishing is the most aspired to activity, however, active recreation activities are popular with cardio fitness (#3); swimming for fitness (#4); working out with machines (#5); working out with weights (#6); and yoga (#8) included. Hiking, one of the most popular passive activities nationally is #10.
- For the 55-64 age group; fishing is again the most aspired activity; but fewer active recreation activities are included with more outdoor recreation such as shooting (#2), camping (#3), hunting (#6) ranking higher. Working out with weights (#4); swimming for fitness (#5); working out using machines (#7); cardio fitness (#9); and running/jogging (#10) are most aspired active recreation activities.

Participations trends were also analyzed by generations types, see **Figure 4**. Participation rates of population older than age six (6), as well as, one-year and three-year trends are identified. For the Boomer generation (1945-1964), highest participation was in fitness (66.2%) and outdoor sports (43.3%), however, the highest growth was in racquet sports (+46.1%). For Gen X (1965-1979), fitness and outdoor sports remain the highest in overall participation rates, but trends indicate racquet sports (+30.2%), water sports (+23.5%), and team sports (+20.2%) experienced the largest growth.

- The top two (2) most participated sport categories for every generation were fitness and outdoor sports.
- Fitness sports and activities participation rate for the Boomer generation increased 10.7% and racquet sports participation increased 46%.

- For Gen X, racquet sports (+30.2%); water sports (+23.5%); and team sports (+20.2%)

	6-12	13-17	18-24	25-34
1	Fishing	Fishing	Working out with weights	Fishing
2	Camping	Swimming for Fitness	Running/Jogging	Camping
3	Soccer	Basketball	Working out using machines	Working out with weights
4	Running/Jogging	Running/Jogging	Cardio Fitness	Running/Jogging
5	Swimming for Fitness	Martial Arts	Yoga	Cardio Fitness
6	Hunting	Working out with weights	Basketball	Yoga
7	Sledding	Camping	Hiking	Hiking
8	Shooting	Cardio Fitness	Shooting	Working out using machines
9	Baseball	Soccer	Camping	Basketball
10	7 on 7 Football	Hunting	Volleyball	Shooting

	35-44	45-54	55-64	65+
1	Fishing	Fishing	Fishing	Fishing
2	Camping	Camping	Shooting	Camping
3	Working out with weights	Cardio Fitness	Camping	Cardio Fitness
4	Cardio Fitness	Working out using machines	Working out with weights	Swimming for Fitness
5	Working out using machines	Working out with weights	Swimming for Fitness	Working out using machines
6	Yoga	Hiking	Hunting	Working out with weights
7	Running/Jogging	Shooting	Working out using machines	Shooting
8	Swimming for Fitness	Swimming for Fitness	Hiking	Yoga
9	Shooting	Yoga	Cardio Fitness	Hunting
10	Hiking	Hunting	Running/Jogging	Hiking

experienced the greatest level of increased in participation.

- Racquet sports was the top growth category for Boomers and Gen X generations.

Figure 3: Sport & Fitness Industry Association Non-Participant Top Interests by Age Group

Figure 4: Sport & Fitness Industry Association Participation Rates and Trends by Generation

Boomers (1945-1964)

	2019	2020	2021	2022	1-year change	3-year change
Fitness Sports	59.8%	59.9%	64.4%	66.2%	2.7%	10.7%
Individual Sports	23.1%	22.3%	22.9%	22.9%	0.3%	-0.6%
Outdoor Sports	39.4%	39.5%	41.9%	43.3%	3.4%	10.0%
Racquet Sports	5.5%	6.4%	6.8%	8.0%	18.9%	46.1%
Team Sports	4.3%	4.9%	5.1%	4.6%	-9.2%	8.8%
Water Sports	7.4%	7.8%	8.2%	8.8%	7.5%	18.4%
Winter Sports	3.9%	3.5%	3.7%	3.7%	1.8%	-3.7%

Millennials (1980-1999)

	2019	2020	2021	2022	1-year change	3-year change
Fitness Sports	68.3%	68.7%	70.0%	69.2%	-1.2%	1.3%
Individual Sports	39.8%	41.5%	41.3%	43.4%	5.1%	9.1%
Outdoor Sports	57.5%	59.4%	60.5%	61.6%	1.9%	7.1%
Racquet Sports	17.6%	19.3%	19.3%	21.2%	9.9%	20.4%
Team Sports	27.2%	30.4%	30.6%	31.3%	2.5%	15.1%
Water Sports	15.0%	17.1%	17.2%	18.8%	9.2%	25.2%
Winter Sports	14.9%	14.5%	14.0%	15.8%	12.6%	6.1%

Gen X (1965-1979)

	2019	2020	2021	2022	1-year change	3-year change
Fitness Sports	65.1%	66.0%	64.2%	66.7%	3.9%	2.4%
Individual Sports	29.9%	31.5%	29.6%	31.9%	7.5%	6.4%
Outdoor Sports	50.4%	52.2%	50.4%	52.9%	5.0%	4.9%
Racquet Sports	10.1%	12.2%	11.8%	13.1%	11.5%	30.2%
Team Sports	12.0%	15.5%	15.2%	14.4%	-5.4%	20.2%
Water Sports	10.9%	13.0%	12.3%	13.4%	8.9%	23.5%
Winter Sports	8.6%	8.7%	8.2%	9.0%	10.1%	4.6%

Gen Z (2000+)

	2019	2020	2021	2022	1-year change	3-year change
Fitness Sports	53.5%	55.2%	55.8%	55.5%	-0.5%	3.7%
Individual Sports	42.0%	44.3%	44.0%	45.4%	3.1%	7.9%
Outdoor Sports	59.1%	60.6%	60.8%	61.0%	0.3%	3.2%
Racquet Sports	18.1%	22.4%	22.6%	23.4%	3.5%	29.1%
Team Sports	56.3%	56.6%	55.8%	54.8%	-1.9%	-2.8%
Water Sports	12.9%	16.3%	15.8%	17.4%	10.0%	34.9%
Winter Sports	18.9%	19.4%	19.1%	20.4%	7.0%	7.8%

*Sports Categorized

Fitness Activities: Aquatic Exercise, Barre, Bodyweight Exercise & Bodyweight Accessory Assisted Training, Boot Camp Style Training, Cardio Kickboxing, Cross-Training Style Workouts, Dance, Step, and Other Choreographed Exercise to Music, Elliptical Motion/Cross-Trainer, Barbells, Dumbbells/Hand Weights, High Impact/Intensity Training, Kettlebells, Pilates Training, Rowing Machine, Running/Jogging, Stair-Climbing Machine, Stationary Cycling (Group/Recumbent or Upright), Swimming for Fitness, Tai Chi, Treadmill, Walking for Fitness, Weight/Resistance Machines, and Yoga.

Individual Sports: Adventure Racing, Archery, Bowling, Boxing for Competition, Boxing for Fitness, Golf on a 9 or 18-hole Golf Course, Horseback Riding, Hunting (Bow, Handgun, Rifle, Shotgun), Ice Skating, Martial Arts, MMA for Competition, MMA for Fitness, Roller Skating (2x2 Wheels, Inline Wheels), Shooting (Sport Clays, Trap/Skeet), Skateboarding, Target Shooting (Handgun, Rifle), Triathlon (non-Traditional/Off Road, Traditional/Road).

Outdoor Sports: Adventure Racing, Archery, Backpacking Overnight, Bicycling Adventure Racing, Archery, Bowling, Boxing for Competition, Boxing for Fitness, Golf on a 9 or 18-hole Golf Course, Horseback Riding, Hunting (Bow, Handgun, Rifle, Shotgun), Ice Skating, Martial Arts, MMA for Competition, MMA for Fitness, Roller Skating (2x2 Wheels, Inline Wheels), Shooting (Sport Clays, Trap/Skeet), Skateboarding, Target Shooting (Handgun, Rifle), Triathlon (non-Traditional/Off Road, Traditional/Road).

Racquet Sports: Badminton, Cardio Tennis, Pickleball, Racquetball, Squash, Table Tennis, Tennis.

Team Sports: Baseball, Basketball, Cheerleading, Football (Flag, Tackle, Touch), Gymnastics, Ice Hockey, Lacrosse, Paintball, Roller Hockey, Rugby, Soccer (Indoor, Outdoor), Softball (Fast-Pitch, Slow-Pitch), Swimming on a Team, Track and Field, Ultimate Frisbee, Volleyball (Beach/Sand, Court, Grass), and Wrestling.

Water Sports: Boardsailing/Windsurfing, Canoeing, Kayaking (White Water, Sea/Touring, Recreational), Jet Skiing, Rafting, Sailing, Scuba Diving, Snorkeling, Stand-Up Paddling, Surfing, Wakeboarding, and Water Skiing.

NSGA: Sports Participation Lifecycle Demographics (2023)

The National Sporting Goods Association's Sports Participation Lifecycle Demographic report analyzes participation rates for 51 sports and activities. Information includes frequently of participation, gender participation rates, and overall market size. Seven (7) sports are summarized below with relevance provided for senior population (age 65+) participation rates. Sports are listed in descending order of senior household participation rates.

For many of the sports listed below, senior household participation rates that meet the definition of frequently, as defined for each sport, various from 25-100%+ above typically average household participation rates, illustrating an higher demand for many of these sports.

Exercise Walking:

- 54.1% of all senior household participate in exercise walking.
- 22.0% of all households participate in exercise walking frequently, defined as 110 times annually or more.
- Of senior households participating in exercise walking, 49.5% participated frequently (110+ times annually); 35.1% participated occasionally (between 25-109 times annually); and 15.3% participated infrequently (2-24 times annually).
- Senior households participate in exercise walking frequently (49.5%) approximately 25% more than an average household nationally (39.4%).
- A slightly higher female (55.1%) to male (44.9%) ratio of senior participants exists.

Swimming:

- 11.8% of all senior households participate in swimming annually.
- 1.37% of all seniors participate in swimming frequently, defined as 110 times annually or more.
- Of senior households participating in yoga, 11.7% participated frequently (110+ times annually); 39.6% participated occasionally (between 25-109 times annually); and 48.8% participated infrequently (2-24 times annually).
- Senior households participate in swimming frequently (11.7%) approximately double an average household nationally (6.1%)
- A higher female (58.0%) to male (42.0%) ratio of senior participants exists.

Golf:

- 8.05% of all senior households participate in golf annually.

- 2.56% of all seniors participate in golf frequently, defined as 40 times annually or more, more than double all other household types.
- Of senior households participating in golf, 31.9% participated frequently (40+ times annually); 39.3% participated occasionally (between 10-39 times annually); and 28.8% participated infrequently (2-9 times annually).
- Senior households participate in golf frequently (31.9%) approximately 50% more than an average household nationally (19.2%).
- A much higher male (74.4%) to female (25.6%) ratio of senior participants exists.

Yoga:

- 6.76% of all senior households participate in yoga annually.
- 3.46% of all seniors participate in tennis frequently, defined as 50 times annually or more.
- Of senior households participating in yoga, 51.2% participated frequently (50+ times annually); 38.4% participated occasionally (between 6-49 times annually); and 10.4% participated infrequently (2-5 times annually).
- Senior households participate in yoga frequently (51.2%) approximately 60% more than an average household nationally (31.3%)
- A much higher female (81.4%) to male (18.6%) ratio of senior participants exists.

Tennis:

- 2.12% of all senior households participate in tennis annually.
- 0.9% of all seniors participate in tennis frequently, defined as 30 times annually or more.
- Of senior households participating in pickleball, 43.4% participated frequently (30+ times annually); 39.4% participated occasionally (between 5-29 times annually); and 17.2% participated infrequently (2-4 times annually).
- Senior households participate in tennis frequently (43.4%) approximately double the rate of an average household nationally (22.3%)
- A higher male (54.2%) to female (45.8%) ratio of senior participants exists.

Pickleball:

- 1.9% of all senior households participate in pickleball annually.
- 0.4% of all seniors participate in pickleball frequently, defined as 30 times annually or more.
- Of senior households participating in pickleball, 21.7% participated frequently (30+ times annually); 51.7% participated occasionally (between 5-29 times annually); and 26.6% participated infrequently (2-4 times annually).
- Senior households participate in pickleball frequently (21.7%) approximately 50% more than an average household nationally (14.5%).
- A higher male (56.6%) to female (43.4%) ratio of senior participants exists.

Pilates:

- 1.86% of all senior households participate in Pilates annually.
- 1.17% of all seniors participate in Pilates frequently, defined as 25 times annually or more.

- Of senior households participating in Pilates, 63.3% participated frequently (25+ times annually); 21.1% participated occasionally (between 10-39 times annually); and 15.6% participated infrequently (2-9 times annually).
- Senior households participate in Pilates frequently (63.3%) approximately 50% more than an average household nationally (42.2%).
- A much higher male (74.4%) to female (25.6%) ratio of senior participants exists.

4.0 Qualitative Input

Observations noted below are from the November 2023 Town Hall meeting as well as the January 2024 Management Stakeholder Meeting.

- Participants emphasized that Leisure World is an active adult community and that the desired amenities should reflect and support that vision.
- The average age of residents has been continuously increasing. There is a desire to attract younger residents and the amenities should aim to support that.
- There is a desire and need for more walking trails.
- Areas for outdoor entertainment and gathering space are desired.
- Outdoor amenity areas are spread across the campus and not in one central location.
- There are no playgrounds on-site, which is desired by some of the residents for visiting grandchildren.

Amenity Space 1: Tennis/Pickleball Courts

- Facility currently has four (4) pickleball courts and three (3) tennis courts.
- Feedback from the community shows that changes are needed due to increase demand and interest in pickleball.
- Younger residents have increase interest in pickleball.
- Interest in having separate pickleball and tennis facilities to avoid conflicts between players of the two sports.

Key Qualitative Takeaways:

- Conflicts between tennis and pickleball demands with a desire for both to have additional designated courts.
- Community garden popular with residents with a desire for more distribution of plots throughout the community.
- Golf course is a substantial amount of community's open space (85+ acres) while meeting approximately 25% of capacity of a typical 18-hole course.
- Bocce ball, shuffleboard and lawn bowling facilities are not substantially used.
- Aquatics include indoor and outdoor facilities with the outdoor being oldest and in needs of code-compliant improvements or replacement.
- Collection of passive open spaces and parklets that are well maintained but lack relevance to recreation needs.
- Lack of hierarchy in trail and path types, options for loops and varying distances, and inconsistent application of design standards and materials.

Amenity Space 2: Community Garden Area

- Residents can reserve a plot to plant their own gardens.
- Gardens are in good condition and well maintained.
- Currently all located within one area and not close to all mutuals which means most users must drive and park.
- Explore option to add plots at multiple locations closer to mutuals.

Amenity Space 3: Golf Course and Trails

- Existing 18-hole golf course located at the center of the community. Golf course is well maintained with mature trees, ponds, and cart paths.
 - Located at the center of the community on approximately 85 acres.
 - Designed by Desmond Muirhead, it features Bermuda Grass on the fairways and Bent Grass on the greens.
 - The course was certified in 2023 as an Audubon Cooperative Sanctuary.
 - Includes a pro shop, driving range, putting greens.
- Sentiment from the community is that golf is a differentiator and drives value.
 - If reduced in size, possible legal issues from residents who paid extra for “golf view” units.
 - More rounds of golf and more revenue generated over the past few years.
 - ±22,000 rounds of golf last year (compared to 30,000 rounds capacity).
 - Conflict between walkers and golfers
 - Allowing early morning walkers on course cuts off valuable tee times that would lead to increased rounds played. Walkers are permitted on the course until 8:30 am.
 - In the afternoon around 5:00-5:30 people walk in the middle of golfers still playing.
- Explore opportunity for a dedicated circumferential walking path that does not conflict with golf course.

Amenity Space 4: Bocce Ball and Shuffleboard

- This amenity is not heavily utilized.
- Potential to explore option to reduce size or relocate to make room for other amenity areas near Clubhouse 1.

Amenity Space 5: Lawn Bowling

- This amenity is not heavily utilized.
- Explore option to remove to make room for other amenity areas near Clubhouse 1.

Amenity Space 6: Pool

- Outdoor Pool with outdoor seating (Lanai) area.
 - Pool fence is not up to code, awaiting decision from County on exemption. May need to rebuild well/fence.

- Opportunity to build a new outdoor pool and convert the existing sunken pool into an amphitheater.
- Outdoor entertainment space is important.

Amenity Space 7: Magnolia Park and Picnic Area

- Outdoor Park with mature trees, landscaping, walking paths, picnic areas and grills.
- Currently no parking to access.

Amenity Space 8: Fairways South Lake/Park Area (Part of Fairways Mutual)

- Small lake with park areas and a deck over the water located within the Fairways South Mutual.
- Sidewalk for Leisure World Blvd. meanders around lake with a few seating areas.

Amenity Space 9: Daffodil Park Space

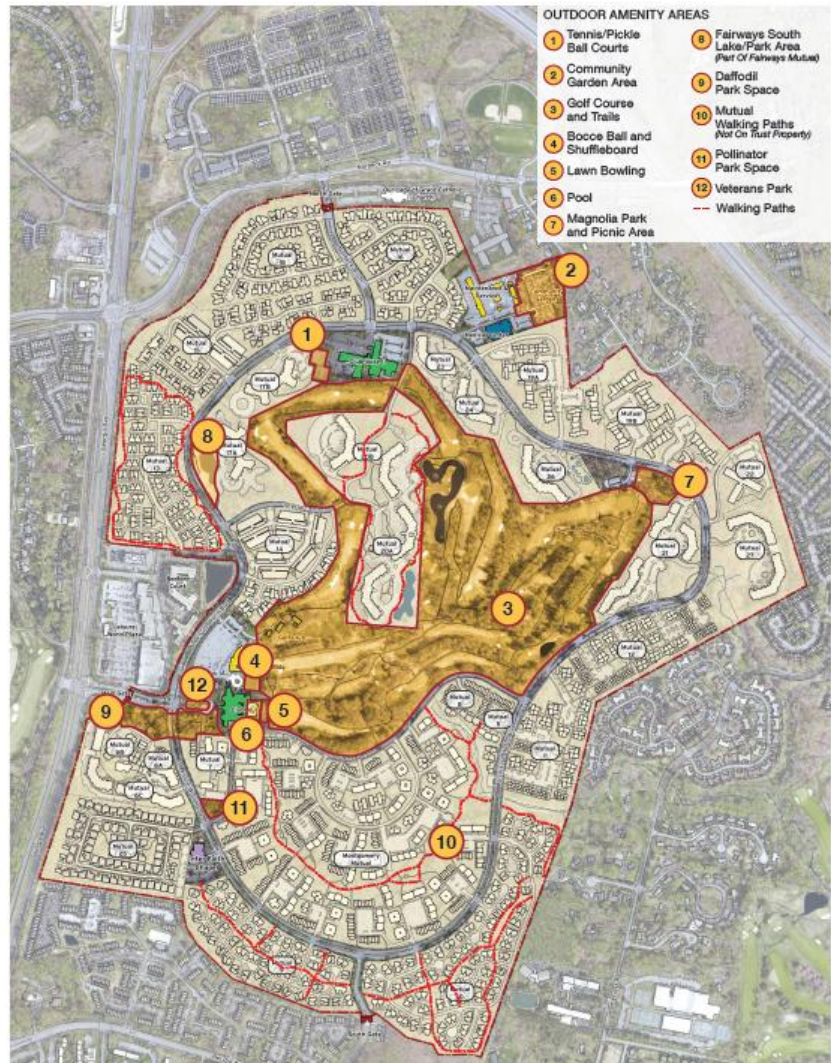
- Small park with mature trees, walking paths, and seating areas.
- There is an open area across Leisure World Blvd., adjacent to the main gate, that is currently not utilized as park space.

Amenity Space 10: Mutual Walking Paths (Not on Trust Property)

- Walking paths located within Montgomery Mutual and Mutuels 9, 10 and 13.
- Paths are inconsistent widths, materials, and lack wayfinding.
- Explore opportunity to integrate these into a larger walking path network for the community under a shared maintenance agreement.

Amenity Space 11: Pollinator Park Space

- Small park with mature trees, landscaping, and seating areas.



Amenity Space 12: Veterans Park

- Small park located at the ellipse area in front of Clubhouse I. Park has cascading fountains, ornamental trees, and lush landscaping. It is well maintained.

5.0 Observational

Observations of park, open space and recreation trends and facilities form a third technique of the needs assessment. In addition to information provided through industry resources, qualitative open space and recreation trends include:

- **Parks and Open Spaces:** The development of parks and open space typically results in the establishment of a classification system for parks based on size and amenities. There are a variety of classification systems that are utilized in different levels of development that are often designated for certain amenities. Frequent classifications include:
 - Pocket Parks
 - Site size – less than 1 acre
 - Focus – passive use
 - Service area – several blocks
 - Small Neighborhood Parks
 - Site size – less than 5 acres
 - Focus - mainly passive use but can have limited active recreational opportunities.
 - Service area – one-half to three-quarter mile radius and or a 5-10-minute walking distance.
 - Open Space – These are also often larger tracts of land that are open areas that are left in their natural state. These often are buffers between developed areas and other natural resources. These areas can include soft surface trails and nature viewing areas.

Key Observational Takeaways:

- Lack of standards or classifications of open space/park types.
- Trail or walking paths lack standards.
- Golf has experienced moderate growth in region, however, trends for recreation play include shorter experiences with 9-hole courses and even reversable courses.
- Rapid growth in demand for pickleball has strained supply.
- Three of the top five core recreation activities nationally involve use of trails, sidewalks, and/or paths.
- As some communities become denser in development, creative solutions for recreation facilities such as rooftop or parking structure caps have become more common for sport courts, community gardens and walking tracks.
- Aquatics have diversified based on demand from various user groups with the most growth in wellness therapy.
- Cost management for golf courses and aquatics, typically two of the highest cost recreation facilities has grown in importance.

- Greenways - These are usually linear parks or waterways that connect to other parks or natural resources and often serve as linkages to other areas of the community. Greenways can be developed parks or natural areas. Greenways may also have hard surfaced community or regional trails.
- Trails – Trails are an important amenity that are often found in the other park areas noted above or could be by themselves. Trails are often categorized into 4 areas.
 - Natural – are soft surface and generally unimproved trails that are typically found in preserves and open spaces.
 - Neighborhood – are usually trails that circle a neighborhood or larger park space and are usually hard surfaced and 6 to 8 feet wide.
 - Multi-use – these trails will usually connect various community amenities such as parks, recreation/community centers, aquatic center, shopping areas and other community buildings. These trails are hard surfaced and can be 10-12 feet wide.
- A growing importance is inclusion of a **hierarchy of trails and paths**. These may include a series of loops of varying distance that include natural or soft surface trails, paved multi-use (pedestrian and cyclist) trails, and sidewalk connections to destinations and park entrances. Connections to local greenway networks are also important.
- **Golf Courses:** Rounds played nationally increased 3.3% in 2023 and increased 10.0% in the DC Metro region (National Golf Foundation). 25% of all rounds played in 2023 nationally were on 9-hole courses.
 - With most rounds played for recreation purposes, 9-hole executive courses are growing in popularity by offering flexibility for players to play a shorter-game or to play twice for a full round.
 - Typical 9-hole courses are par 34-37, and can be played in 1.5-2.5 hrs.
 - A newer trend, though one that dates to the Old Course at St. Andrews Scotland, is a reversible golf course. There are many benefits of a reversible golf course through less land, divot patterns and wear/tear are distributed to different areas and allows for turf to heal better. Additionally, by changing the direction the wind patterns and topography change, bring an 18-hole experience to a 9-hole course.
- **Pickleball** is the fastest growing court sport in the country and, as a result, demand for both indoor and outdoor courts has increased. Though pickleball courts can be striped on tennis courts to share facilities, many pickleball organizations lobby for dedicated courts. Designated courts can reduce conflicts between user groups as peak times for use for both tennis and pickleball courts typically overlap and with different nets, setup and maintenance

can contribute to ongoing challenges. Customarily, four (4) or more courts are provided for pickleball.

- **Core activities** are those that participants complete on a regular basis, not as a casual activity. For most activities, participation rates drop significantly between those that casually participant in the activity versus those that use the incorporate the activity into their daily or weekly exercising route. The following are activities which have significant core participation rates (as surveyed by SFIA 2023 Topline Participation Report):

- Fitness activities far and above the most frequent types of activities that participants complete as a core to their daily/weekly exercise route. There following are the top five fitness activities and the number of participants who complete the activity more than 50 times per year:
 - Walking for fitness: 38.1 million casually; 76.6 million as a core activity
 - Treadmill: 26.4 million casually; 27.2 million as a core activity
 - Free weights: 22.4 million casually; 30.7 million as a core activity
 - Running/Jogging: 23.7 million casually; 24 million as a core activity
 - Weight resistance machines: 12.3 million casually; 17.6 million as a core activity
- Three (3) of the top five (5) core activities consist of walking, running, or jogging.
- Other than fitness activities, the only other activity that is in the top ten (10) as a core activity is basketball (#7 overall) with 13 million casual and 15.1 million core participants.



SkyHouse Uptown Parking Deck, Charlotte, NC - (photo credit: Charlotte Observer)

- An additional solution that is being utilized by urban cities is to develop **rooftops** for open space or recreation facilities. This is particularly useful in higher density areas where property values make the acquisition of ground-level open space difficult. While rooftops can be used for a variety of purposes, the most common application of this strategy is for athletic facilities such as tennis or pickleball courts. Rooftops can also incorporate sustainable strategies such as bio- filtration systems or community gardens. Parking garages are often suitable structures to implement rooftop parks.

- **Aquatics** have evolved in the last fifty years with focus areas now on the following:
 - User Groups: There are four primary user groups recognized for aquatics now: recreation, instructional, competition, and wellness and therapy.
 - Wellness and therapy user group is the fastest growing, typically now with dedicated pools, therapy programs, water exercise and aerobic classes and fitness classes.
 - Revenue Generation: Aquatic facilities are a high-capital cost and high-operational cost amenity. Many aquatic facilities are getting creative in ways to generate revenue to help offset operational and lifecycle replacement costs. Some solutions include:
 - Programming charges: specialized programming can typically require higher operational costs and participants can typically expect to pay additional fee associated with more specialized programs.
 - Training/Licensing/Re-certification: Some facilitate open their pools to be used during typically low usage times for lifeguard, life safety, scuba, or other aquatic training. This can introduce a new stream of revenue for many facilities.
 - Cost Management: Many newer aquatic facilities benefit from improvements to filtration systems which highlight newer, more efficient regenerative media filtration (RMF) systems, geothermal/solar heating and pool covers, and variable frequency drive motors for pumps.

6.0 Conclusion

By utilizing a three-step needs assessment approach to analyze recreation supply and needs in Leisure World, a preliminary site program recommendation can be identified.

Key Findings:

- Acreage LOS indicates an overall need for 116.67 acres of parkland and open space based upon current population. This acreage figure would increase if density and overall population increases.
- Facility LOS analysis indicates a minimum need for one (1) sport court (tennis/pickleball) and potentially as many as four (4) pickleball and four (4) tennis courts based upon participation rates.
- Facilitate LOS indicates additional recreation facilities such as up to two (2) playgrounds, three (3) outdoor basketball courts, and one (1) dog park may be needed.

- National participation rates indicate growth in participants for yoga and Pilates, elevated growth for birdwatching and tennis, and exceptionally high growth for golf simulation and pickleball.
- Exercise walking (54%), swimming (11.8%), and golf (8%) have the highest participation rates among seniors for existing recreation opportunities.
- All racquet sports have experienced growth in last 3+ years.
- Approximately 2% of senior households play tennis or pickleball.
- Pickleball (50%+) and tennis (100%+) have higher participation rates for seniors than average households.
- Conflicts between tennis and pickleball demands with a desire for both to have additional designated courts.
- Community garden popular with residents with a desire for more distribution of plots throughout the community.
- Existing golf course is a substantial amount of community's open space (85+ acres) while meeting approximately 25% of capacity of a typical 18-hole course.
- Golf has experienced moderate growth in region, however, trends for recreation play include shorter experiences with 9-hole courses and even reversible courses.
- Existing bocce ball, shuffleboard and lawn bowling facilities are not substantially used.
- Collection of passive open spaces and parklets that are well maintained but lack relevance to recreation needs.
- Lack of hierarchy in trail and path types, options for loops and varying distances, and inconsistent application of design standards and materials.
- Lack of standards or classifications of open space/park and trail types.
- Three of the top five core recreation activities nationally involve use of trails, sidewalks, and/or paths.
- As some communities become denser in development, creative solutions for recreation facilities such as rooftop or parking structure caps have become more common for sport courts, community gardens and walking tracks.
- Aquatics include indoor and outdoor facilities with the outdoor being oldest and in needs of code-compliant improvements or replacement.
- Aquatics have diversified based on demand from various user groups with the most growth in wellness therapy.
- Cost management for golf courses and aquatics, typically two of the highest cost recreation facilities has grown in importance.

Recommended Recreation and Open Space Program

Recreation facility, park, and open space recommendations include the following:

- Additional four (4) pickleball courts and two (2) to four (4) tennis courts for designated use.
- One (1) playground, centrally located and accessible.
- One (1) dog park with potential for a dog run on roof top or parking structure.
- Redevelopment of existing outdoor pool to consist of a recreation pool, lap lanes, a therapy pool, with pool deck programmable space.
- Establishment of trail standards and hierarchy of trail types to include off-street and on-street facilities.
- Reconfiguration of existing 18-hole golf course into an executive 9-hole course.
- Redevelopment of a portion of existing golf course into a naturalized area for passive recreation uses such as birdwatching, walking/hiking and outdoor programs such as painting, photography, yoga and tai chi.
- Development of community garden spaces in smaller clusters more accessible to residents.
- Development of outdoor fitness stations along trails or walking paths.
- Development of shaded seating social spaces within parklets and pocket parks.

Potential Housing Locations



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Potential Development Sites
LEISURE WORLD MASTER PLAN



Site A - Clubhouse I Parking Lot

This site was chosen because it represents the largest “unencumbered” parcel already owned by the Trust. Two options were studied for redeveloping the surface parking lot at Clubhouse I.

Any development of Site A would need to replace the current parking in a new structure combined with resident parking. Parking structures provide cover from inclement weather that some users may prefer, although opinions vary on the desirability of navigating through garages. Special considerations must be made to enhance access and way-finding for residents and guests parking in the garage to visit Clubhouse I.

A parking garage adjacent to Clubhouse I and the Administration building also presents an opportunity to incorporate a covered shuttle stop/transfer area.

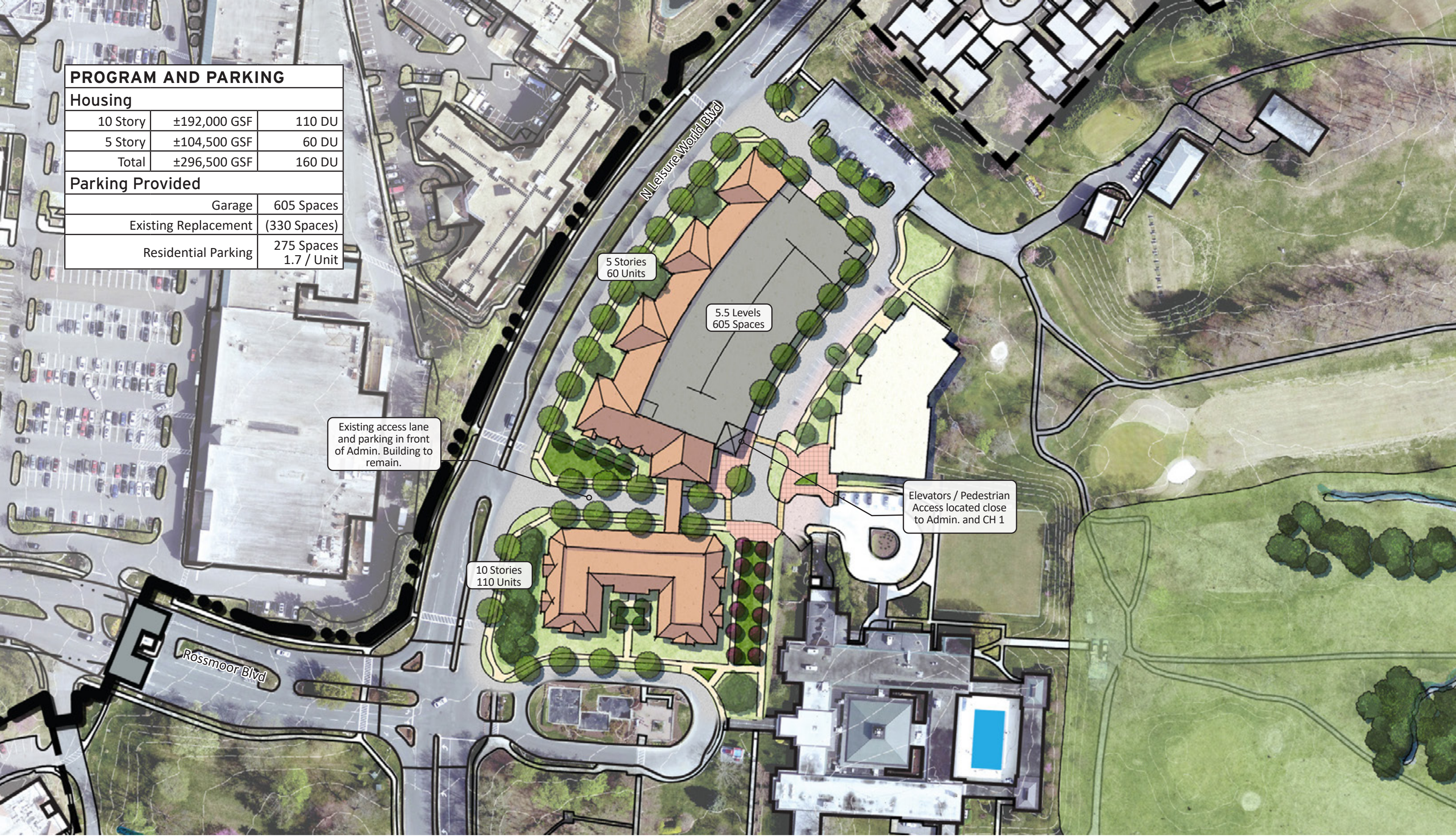
Pro:

- Land is currently owned by the Trust.
- Adjacent to Clubhouse I and Amenities
- Location at Main Entrance provides opportunity to create grand first impression and set the stage for Leisure World
- Parking and elevators are closer to Clubhouse in A2

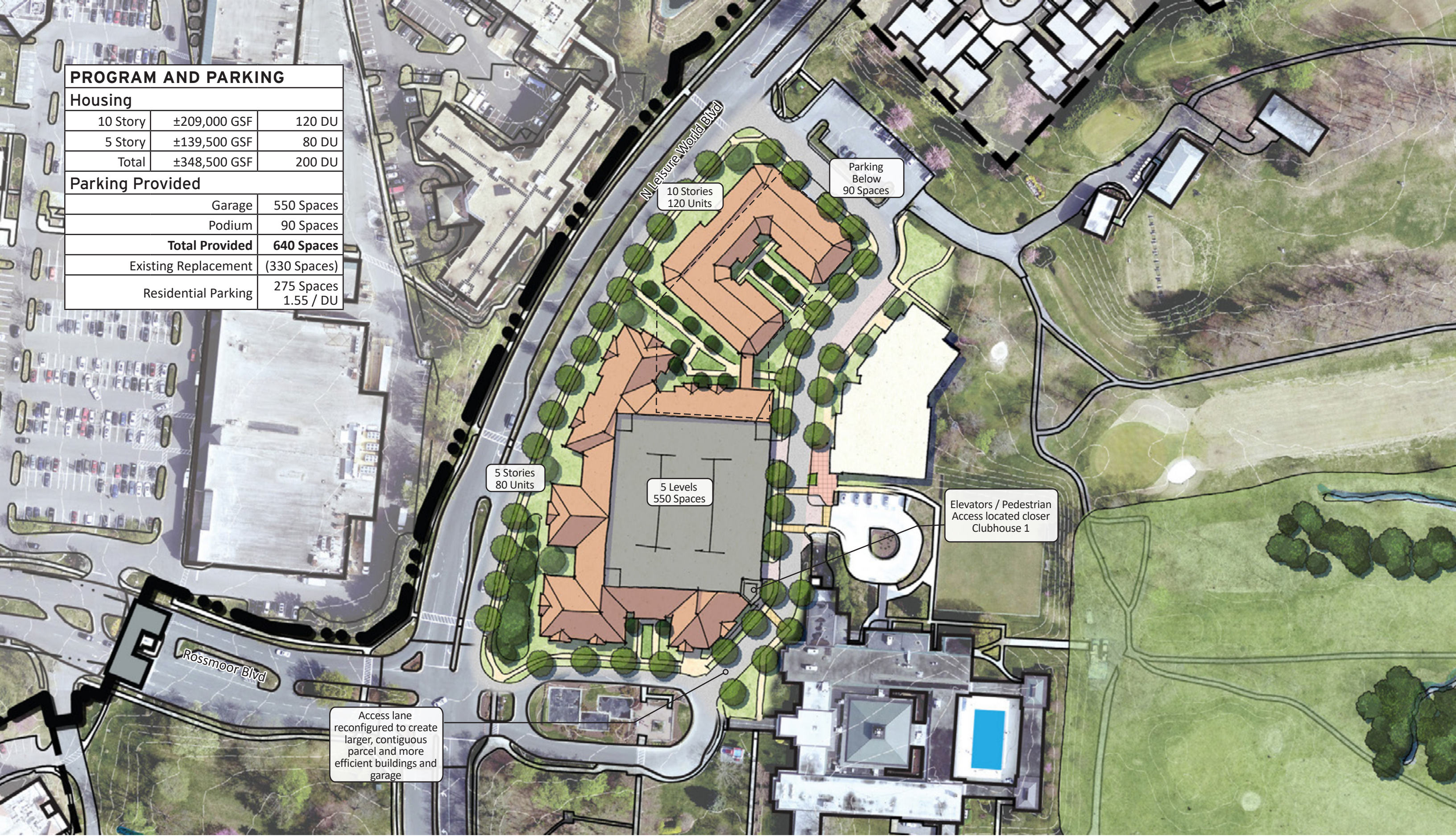
Con:

- Replacement of existing parking increases cost of housing development
- Temporary interruption of parking and building access during construction
- Site constraints do not allow for efficient building and garage design
- Curved garage in A1 would add cost

PROGRAM AND PARKING		
Housing		
10 Story	±192,000 GSF	110 DU
5 Story	±104,500 GSF	60 DU
Total	±296,500 GSF	160 DU
Parking Provided		
Garage	605 Spaces	
Existing Replacement	(330 Spaces)	
Residential Parking	275 Spaces 1.7 / Unit	



PROGRAM AND PARKING		
Housing		
10 Story	±209,000 GSF	120 DU
5 Story	±139,500 GSF	80 DU
Total	±348,500 GSF	200 DU
Parking Provided		
Garage	550 Spaces	
Podium	90 Spaces	
Total Provided	640 Spaces	
Existing Replacement	(330 Spaces)	
Residential Parking	275 Spaces 1.55 / DU	





Site B - Acquire and Consolidate Units

The second option for redevelopment at Leisure World is to acquire and consolidate units to create a redevelopment parcel.

Mutual 7 was chosen for study because it is one of the smallest, oldest, and least expensive mutuals in Leisure World. It is also next to Clubhouse I and the main entrance, positioning that allows it to have an impact on the image and perception of Leisure World for residents, potential residents, and guests.

Pro:

- Adjacent to Clubhouse I and Amenities
- Location at Main Entrance provides opportunity to create grand first impression and set the stage for Leisure World
- Opportunity to consolidate smaller residual open spaces into larger park

Con:

- Cost and complexity of acquiring individual units in Mutual 7

PROGRAM AND PARKING		
Housing		
10 Story	±209,000 GSF	120 DU
5 Story	±235,000 GSF	135 DU
Total	±444,000 GSF	255 DU
Parking Provided		
Garage	438 Spaces 1.7 / DU	

Cross-block walkways and courtyards create pedestrian connectivity and links to surrounding Mutuels.

Multiple smaller open spaces consolidated to create more usable and impactful space.

10 Stories
120 Units

6 Levels
438 Spaces

5 Stories
135 Units

Leisure World Blvd

Glencages Dr



Site C - Golf Course / Central Open Space

An overall recommendation is that a portion of land currently dedicated to the golf course be reconfigured as multi-use open space. This would maintain the important central community open space while also providing additional amenities and recreational opportunities for all residents of Leisure World.

Development of Site C fits in to this overall framework and proposes redeveloping a portion of the open space with housing for new residents. Variations are presented on the following pages with differing configurations for the number and/or location of buildings at this site.

It should be noted, if this location is not ultimately chosen as a desired housing site, it should be considered as the location for a major recreational facility or destination. This would help fill a previously identified lack of amenities on the east side of Leisure World.

Pro:

- Land is currently owned by the Trust
- Overlooks golf course and reconfigured central open space
- Opportunity for variety of building types and sizes
- C1 achieves 353 units
- C2 proved parking for open space users
- C3 has least visual impact

Con:

- Reconfiguring central open space for residential development on a portions of the land
- C1 has greatest visual impact

PROGRAM AND PARKING		
Housing		
10 Story	±140,000 GSF	80 DU
9 Story	±195,200 GSF	112 DU
5 Story	±278,500 GSF	160 DU
Total	±296,500 GSF	352 DU
Parking Provided		
Garage	400 Spaces	
Podium	55 Spaces	
Surface Lot	115 Spaces	
Total	570 Spaces 1.6 / DU	



PROGRAM AND PARKING		
Housing		
10 Story	±140,000 GSF	80 DU
5 Story	±278,500 GSF	160 DU
Total	±296,500 GSF	240 DU
Parking Provided		
Garage	400 Spaces 1.66 / DU	



PROGRAM AND PARKING		
Housing		
9 Story	±195,200 GSF	112 DU
Parking Provided		
Podium	55 Spaces	
Surface Lot	115 Spaces	
Total	170 Spaces 1.5 / DU	





Site D - PPD, Medical Center, Gardens

Site D is the largest of the four potential opportunity sites and offers the largest capacity for building out additional housing at Leisure World. Unlocking the development potential, however, requires multiple prerequisite steps, including the relocation or reconfiguration of existing uses and buildings on site. Elements of plan development can be phased, allowing relocation to occur in sequence rather than simultaneously.

It is recommended that the community gardens be relocated to the reconfigured central green space. The Medical Center would be moved to the site of the old Administration Building.

There are two variations for how to configure the PPD buildings. The first plan recommends a reconfiguration of the buildings and service yards with minimal consolidation. The second option suggests relocating storage and warehousing completely off-site to fully realize the development potential of the site.

Pro:

- Land is currently owned by the Trust
- Large site provides opportunities for new open space network and walking trails
- Close to Clubhouse II and Amenities
- Large site provides the greatest opportunity to build more units at once
- Relocating Medical Center to Site A can reinforce the identity of a “Town Center” at the entrance and provide “updated” architectural character
- A small number of rooms for visitors could be added to a second floor above the relocated medical center
- D2 yields the most residential units of all options

Con:

- Requires relocating multiple existing uses and buildings

PROGRAM AND PARKING

Housing

5 Story	±400,500 GSF	230 DU
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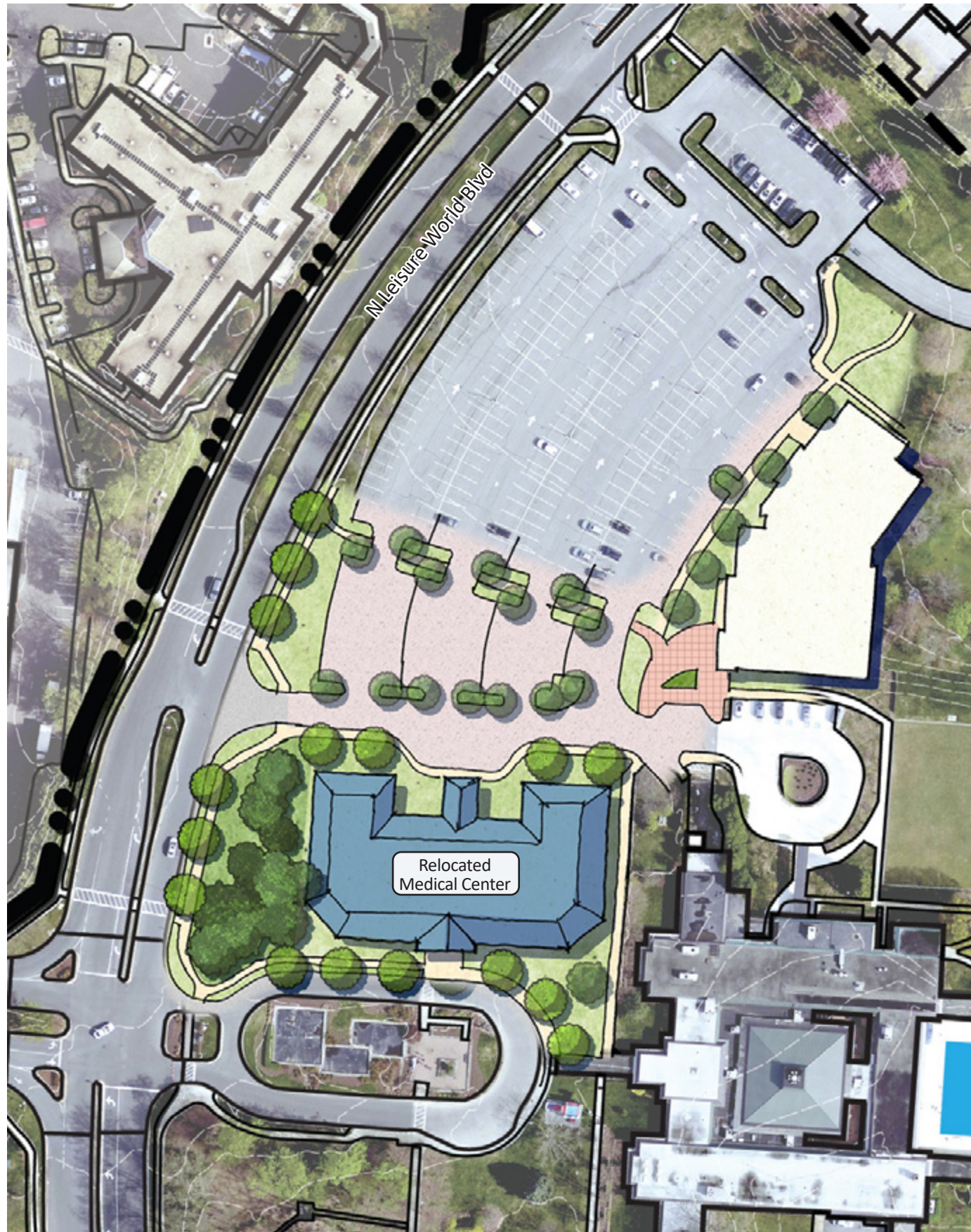
Parking Provided

Garage	384 Spaces 1.66 / DU
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PROGRAM AND PARKING		
Housing		
5 Story	±652,500 GSF	375 DU
Parking Provided		
Garage	576 Spaces 1.5 / DU	





April 25, 2024

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Potential Development Sites - D Off-site
LEISURE WORLD MASTER PLAN

Town Hall 2: Summary of Comments

Town Hall 2 Summary

Town Hall 2 took place on Wednesday, October 16. Approximately 125 people were in attendance. Following the presentation, residents were invited to discuss the plan at four different stations: Open Space, Housing, Clubhouses, and Transportation. Feedback was taken through multiple methods. During discussion with residents, notes were written on large flip charts. Residents left specific comments directly on the drawings with sticky-notes as well as leaving note cards in a drop box following the meeting. Additionally, 15 residents sent emails with comments and suggestions through an October 23 deadline.

Hand-written notes and comments were transcribed and sorted into the four main topic areas plus some general comments. Comments have been reviewed and organized for consideration and incorporation into the final Master Plan recommendations where appropriate. Due to the limited number of people who attended the Town Hall and sent emails, it is important to note these responses do not comprise a representative sample of Leisure World residents.

Summary of Feedback

In general, the response of people in the room was positive, with some notable exceptions. Recommendations relating to the golf course generated the most discussion, with residents split on the proposal to convert part of the golf course into other open space amenity uses.

Future housing development generated little discussion, with most people preferring option D and opposing option C. There were not comments relating to options A or B. Some residents expressed the opinion that even if Leisure World is allowed to build more housing, they do not think it should be built, citing infrastructure concerns.

Recommendations for improving the clubhouses and indoor amenities were generally the most popular. Residents mentioned the need to accommodate ADA accessibility and ensure projects are built correctly.

Residents were largely supportive of safety improvements for pedestrians. Crosswalk safety and visibility are top priorities. Bicycle lanes are generally well-supported but some residents doubted if they were necessary, questioning the number of cyclists in the community.

Summaries of the individual topics and comments received are found on the following pages.

Open Space

Recommendations for the golf course generated the greatest amount of discussion at the open house and in subsequent communications. Residents were mixed on “right-sizing” the golf course, with some enthusiastically in support of the idea and some vehemently opposed. Many residents supported additional walking trails and suggested other possible locations around Leisure World. Sustainability and stormwater management in the open space and golf course was raised as a pressing issue.

Feedback was also mixed on a playground or other amenities for visiting children with some people citing noise and safety concerns and others pointing out other playgrounds exist in the vicinity. Likewise, some residents expressed concerns about noise and maintenance around the dog park along with liability concerns.

Comments

- Like what has been studied
- Sounds like you listened.
- Consider flipping golf/park location (back 9 are more challenging).
- I support changing the golf course to 9 holes, and adding the playground, dog park, etc.
- Yes on decreasing golf course to 9 holes
- Keep 18 holes of golf.
- Hands off the golf course.
- Keep 18-hole Audubon certified
- Yes – Make it a 9 hole golf course!
- Love idea if moving forward to 9 hole golf course
- Open golf to non-residents (Already exist)
- Audubon certification may be impacted.
- Yes on golf course reduction
- I am totally on board with repurposing half the golf course for other outdoor uses
- Not a golfer, but walk on the golf course. Audubon certified. One of, if not the, greatest monetary asset at Leisure World. Increased property values.
- Closing 9 holes is a very bad idea. Typically plays 60-90 rounds per year. 18 holes is important. Have heard similar comments from non-golfers over the years, responds: just because you don't play golf doesn't mean it's not an important amenity.
- How many residents Vs number of golfers.
- Consider erecting barriers along golf course to allow more walking areas
- Sustainable infrastructure - solar on golf course
- Only senior community in the area with an 18 hole championship course. ±\$700,000 revenue this year. ±22,000 rounds played this year. Switching to 9 holes would mean loss of golf pro, golf lessons, tournament, Golf Club and League Play. Golf course is SWM for community

- Reducing golf course to build more housing is a terrible idea. 18 hole course is a treasure for LW. Important reason why many people choose to buy. Golf course is widely used off-hours for hiking. Mistake to eliminate part of the course.
- More golfers than pickleball players, don't contribute as much to LW. Replacing revenue producing amenity with non-revenue producing amenities seems short-sighted.
- Golf course recently updated. Major source of revenue. Improves real-estate values. Increasing number of golfers, including guests and visiting clubs. Golf course is maintained, open space would not be maintained. Important for SWM.
- Provide 2 sets of recommendations, one set with keeping 18 holes and one set with just 9 holes.
- Reducing golf course could have legal issues, violating Trust documents. Tacit understanding that 18 holes will be part of community.
- Not a golfer, but believe the 18-hole course adds value, both financially and emotionally.
- Estimated revenue is \$845K. 9 holes will be less than half of that. Greens fees will need to be decreased. Rounds played will decrease by more than half. League play cannot occur, most people will seek another venue. Will no longer be "championship course" per MD State Golf Association. Can't maintain golf handicap indices. Think most of the members will quit golf and go

elsewhere. Real estate values will go down.

- Develop Plan B that leaves out golf course and uses other property, other possible open space. Other gated communities with 18-hole golf courses have waiting lists for golf membership. Second-tier communities with golf are seeing renewed interest and raising dues and fees.
- Sound at pickleball location. Move East? Add berms?
- Pickleball – keep 300- from D.U
- Pickleball noise
- Ok with adding more pickleball courts, but stadium is too much. What is the ROI. Is there an accurate count of residents that play?
- More courts would be nice, but stadium is unnecessary. Noise concerns would make residents protest.
- Does pickleball raise revenue?
- Pickle Ball on bocce green great! Yes on Pickleball Courts!!!
- Pickleball courts – Please be sure if new housing is built near golf course etc, that pickle ball courts are nowhere near residences. The sound from this beloved sport is maddening when non-stop. Thanks!
- Connection from The Greens to south desired.
- I moved here during COVID. There had been shuffleboard and Bocce ball courts which have now disappeared. Not all of us physically can play pickle ball. Those were games that older

residents could play and play with grandchildren. Think about sending out a survey asking for interest in the return of these outdoor games how a corn hole game. All of these can be in one place and handicapped could use.

- How about covered picnic shelters with grills throughout LW?
- Picnic pavilion on common property with facilities and outdoor grilling. Clubs and mutuals could pay a fee to reserve and use.
- Community Gardens are a Trust Amenity in the original trust docs.
- Consider and outdoor amphitheater instead of dog park + playground.
- Liability of playground?
- Don't move the medical center. Leave that traffic where it is and don't add gardens in sum, don't cut down trees to move garden
- No need for a play park or a dog park. We have spent so much money on the course it would be a crime to cut it up.
- Who is responsible for cleaning the dog park?
- No playground or amenities for kids. Older residents want safety, security, and quiet. Issues with lack of supervision and discipline of visiting grandchildren. Other parks are

nearby, with playgrounds and rec. facilities.

- Dog park source of injuries and noise. Other dog parks in the surrounding community.
- Dog park is a terrible idea. Very few people own dogs, and those that do would not use the dog park. Maintenance, clean up, and noise are concerns. County dog park up the road.
- Individual mutuals have tried to add dog parks, and it didn't work or they were voted down.
- Walking trail around circumference of LW is being discussed.
- Existing walking trails people don't know about. Opportunity to build additional trail around periphery of property.
- More places to sit while walking.
- Broadwalk and other sidewalks are good enough for walking. Can also add trails around inside perimeter of LW.
- Need to consider SWM and risks of 60+ year old infrastructure. SWM system on golf course needs to be repaired and maintained. Flooding and damage have occurred.
- Plan would destroy the ecosystem. Water drainage is an issue. Plan would remove permeable area

Housing

Among the potential development options presented, there was no specific feedback on Sites A or B. Site C (on the current golf course) was the least popular option. Site D received the most positive feedback and support.

Residents also suggested expanding the size of Leisure World and building additional housing on this “new” land.

Some people had concerns about additional housing being too expensive. Several respondents suggested that Leisure World was “built-out” and couldn’t accommodate any more housing or did not need any more housing.

Finally, some residents expressed a desire for a hotel or other short-term accommodation on site.

Comments

- Aquarius Local Park – Potential lot for development
- Expand outside the gate?
- Increasing LW Footprint
- Do we need more Housing?
- More larger units.
- Evaluate the age of existing housing. Is it worth demolishing?
- Existing housing improvements.
- Don’t want to lose economic diversity
- Add expensive housing, but don’t lose affordable housing
- Existing range of incomes in Leisure World
- If additional housing is higher cost, will we lose economic and ethnic diversity? Will new residents with more money want to upscale the community?
- I am in favor of site D for new housing long term.
- I much prefer site D for redevelopment. Do not convert open space or parks into housing.
- Site D is most feasible.
- Option D1 makes sense. On site PPD is convenient.
- Even though I am a gardener, Option 4 seems the best – moving gardens + MedCenter.
- Stack PPD in one building.
- Can PPD shrink?
- Keep PPD on site
- East ditch behind site D might cause issues.
- PEPCO Easement? SWM
- Relocating Medical makes sense. Good amenity for LW
- I am ambivalent at best about adding new housing, among other things, it’s not a sustainable way of resolving our financial issues.
- We are limited in water for new homes.
- New homes = more parking. Parking is too expensive, also bigger vehicles = infrastructure.
- Hotel?

- I think that a valuable amenity would be a place where guests could spend the night or even a week. Some of our apartments are too small to comfortably accommodate visitors.
- Montgomery County would only consider additional housing if they were low-to-moderate income rentals.
- Leisure World is built out.
- There may be additional housing units approved, but LW is functionally built-out. No room or need for additional housing.
- Statement about needing new housing not proven and probably wrong.

Clubhouses

Recommended improvements to the Clubhouses were the most popular elements of the presentation. Residents appreciated proposed improvements to the front façade of Clubhouse I and renovation of the auditorium in Clubhouse II.

In addition to the improvements presented, both the indoor and outdoor pools were identified as needing ADA lift chairs to enter the pool. Construction and design deficiencies in the existing locker rooms were also mentioned.

Comments

- Design standard (Consistent level of interior design for all amenity spaces)
- Add levels to and expand clubhouse 1+2 for meeting space, MedCenter facility, visitor housing.
- Like architectural change of Clubhouse 1
- ADA access at pool, need pool lift.
- A chair access point is needed in indoor and outdoor pool.
- Noise from Lanai: HVAC unit.
- More rooms for new residents at pools.
- Wi-Fi improvements
- Can't build up other than out? Can have an open upstairs
- Starbucks or Café
- Remodel restaurant and grill
- Concerns about noise on Lanai
- Not sure if breaking Lanai into two pieces is a good idea
- Love all the ideas for Clubhouse 1
- Pool & Lanai – get it finished in off season
- Realizing this design is just preliminary, it would request that front overhang for folks waiting be an improved design from what's shown which already looks outdated, as in 50's or before.
- Would like Olympic size outdoor pool with more seating.
- Glut of unused meeting rooms with completion of Administration building. But, support adding to the façade on the front of CHI to provide more welcoming appearance.

- Porte cochiere must cover the driveway
- Water issue in auditorium
- Windows fog up at indoor pool
- Theater additional exit (Provide a third means of egress at theater)
- Stairs: Put where lift is.
- Widen Stage
- Fewer seats in auditorium?
- Please consider adding a Bowling Alley to the amenities. Hopefully before 20 years.
- I think the lobby in Clubhouse 2 is a waste of space.
- Please ensure ADA access to the indoor lane pool
- Pool locker room, need to correct each shower area that has no space to sit water all over floor
- Love renovation of theater.

Transportation

Safety improvements in Leisure World were well-received by residents at the Town Hall. Most residents agreed with the goals of slowing traffic and removing free-flowing right turns. Crosswalk safety was another priority, with residents suggesting additional reflective stripes or on-demand blinking signals to increase driver awareness at intersections.

The existing transportation system has mixed opinions, with many residents expressing frustration with the schedule. The need to improve service and access for disabled passengers was noted. Residents suggested if the transit service was more reliable or regular, they would use it more often. Concerns about the cost and efficiency of the shuttle system were another concern.

In general, bicycle lanes were a popular recommendation although some residents disagreed. Many residents pointed out the need for additional bike parking at destinations and a bikeshare system would both increase bicycling rates in Leisure World.

Comments

- Prioritize safety improvements by crosswalk, restrict free flow turns.
- No speed bumps.
- How would restricting free flow impact traffic here?
- Increased striping awareness of roadway conditions.
- Speeders are outside contractors + visitors.
- Parking should be restricted on LWB
- Reflective strips or flashers in the pavements at crosswalks.
- More speed limit signs
- 30mph to 25mph
- Cameras + Tickets.
- I believe that a study of the speed camera data shows little speeding > 30mph
- I'd like to see striped right turn lanes off LW Blvd for smooth flow. Some drivers are very slow.

- More slow down signs to protect wildlife.
- Repercussion for speeders (come from outside)
- 10-15% of on-street parking on LWB is occupied.
- Leisure World founders determined that Leisure World Boulevard needed to be wide to accommodate parking when needed. Well-maintained, wide open lanes of LWB are a major selling point for the community.
- Reconfiguring streets. Please note that walkways are narrow ie – if a wheelchair is coming in the opposite direction, we need to step off the walkway to make room for them. It would be good to widen walkways on LWB.
- Pedestrian path connectivity from Mutual 20 to Clubhouse 1
- Stairs to LWB connecting to mutual 13 from 17A
- I live in Montgomery Mutual. To get to the shuttle bus I have to cross Chiswick Ct at sharp curve. Very unsafe. Told there is not enough sight distance for crosswalk. Consider crossing signal/HAWK.
- Focus on serving existing ADA needs + transit service before adding new vehicles.
- Buses are empty
- Point to Point handicap accessible service that is more cost effective than ADA van.
- Improved users experience coverage. Professional drivers, insurance.
- I don't use shuttle because schedule is inconvenient.
- Not sure how direct the routing is.
- Has the high cost + inefficient LW bus fixed schedule been considered in the plan.
- More enhanced point to point/on-demand services
- Assist folks to access transit & activities.
- What is the true total cost per passenger/mile of the LW bus routes?
- Continuous shuttle bus around LW Blvd – Great Idea.
- Bus shelters & more transit amenities.
- Point to point is low cost but does not meet needs of wheelchair bound people.
- Enhanced shuttle would encourage me to not drive.
- What's the difference between current bus routes – not on demand + circulation
- I'm a little confused about the proposed plan, we already have at least in theory shuttle services that operates on a reliable and regular schedule, so I was unclear on what – other than extending hours operation – you are recommending doing differently.
- I like a lot of what is proposed for transportation things to consider some of us would really welcome more buses coming on campus, but there is an ongoing anxiety in the community about nonresidents arriving by bus.

- Prefer cycle track, especially in southern portion of loop.
- Very few bicyclists.
- How many bike riders are in LW?
- Biking on LW Blvd dedicated lane – OK
- Parking to maintain along outer lane.
- Bike lanes yes, but I like the bulb out coming from front gate – turning right onto LW Blvd.
- Feel strongly about separating bikes + drivers
- Aren't enough cyclists interested in riding to justify narrowing lanes.
- Love bike lane idea
- Bikers need bikes racks at the clubhouses and MedCenter.
- Enjoy biking inside and outside of LW. Currently ride on LWB as a loop and see other cyclists, seems safe and friendly.
- Concerned that bike lanes next to curb would be confusing for people trying to parallel park “in the middle of the street.”
- Bike lanes on both sides are preferred.
- Have rental bike stations.
- E-bikes / electric charging in garage
- Cycle track on outer loop until Glen Eagles, then cross to inner loop.
- I would value, appreciate and use bike paths in the community. Not short quarter mile stretches, but longer stretches, even 1 or 2 miles. The 3rd mile LW Blvd stretch is great.
- Lack of parking in Montgomery Mutual

Other

Many comments were received that did not directly apply to one of the preceding categories. They have been collected below. As many of these are unrelated to each other, there is not a summary of resident sentiment or key takeaways for this section.

Comments

- Focus on small, easier projects (Less controversial)
- Deer fence (Community)
- Has the capacity of the LW Storm water system been properly considered.
- Most of LW facility infrastructure is over 60 years old.
- 13' construction fill up gardens – stormwater
- Donors (Recruit donors to fund specific projects as universities do for example)
- Need alarm/public address system in all buildings.
- Cost Estimates?
- Geothermal heating mutual 20
- Engage in federal or local funds for safety enhancements.
- Increase property value

- Add vertical wind turbines.
- Additional revenue
- Highest median age = Assisted living.
- Gate to go to plaza
- If EV charging is considered, please note that a high percentage of owners prefer Level 1 charging in their own parking place rather than a shared Level 2 charger.
- Invest in income producing property outside LW for capital fund sources.
- It is impossible for us to give decent feedback when we don't know how much each project will cost (estimate) and how many people who will benefit it.
- Have all LW storm water structures been included in the plan? Garden = Drain Age? Space.
- Has the critical storm water management function of LW's green space been preserved in the master plan?
- New residents often have more than one car but existing parking lots built offering only one space.
- How will new BEPS standards be considered in the decision + scheduling making for design, functionality and cost for the master plan?
- Where is the value of energy conservation?
- I didn't hear anything about incorporating geothermal and solar.
- LW needs a general inspector
- We need to improve Wi-Fi and technology access in the clubhouses.
- We need a cell tower near Leisure World. The cell phone reception is terrible.
- Invest in income-producing property outside LW to obtain capital funds. Trust documents permit this.
- Plan for climate change.
- Resilience cost safety
- Not thinking far enough ahead!
- Presentation not based on fact, but on input of a few residents.
- Upset and taken off-guard. No data or research. Ideas based on emails prompted by small group of disgruntled residents.
- Have been misled by a biased agenda. Should have had courtesy to talk with GM prior to presentation. Whole presentation has been tainted.
- Great presentation.
- Trust is resident owned, this plan is better suited to a business. Trust doesn't have profit motive. Plans will cause major dissent, legal issues, and everything will end up delayed.
- Don't want to live on a construction site for remaining years of life.

Community Comparison, Assessment, Rationale, Implementation, and Phasing

Summary of Deliverables

Tasks 1-5

Leisure World of Maryland

Silver Spring, Maryland

Prepared for Leisure World of Maryland

Task 1: Background Review and Initial Findings

February 28, 2024

KEY FINDINGS

LEISURE WORLD OVERVIEW

Leisure World is bolstered by its strong amenity package but is hampered by its outdated housing choices.

- ▶ Leisure World benefits from its strong amenity package, with two clubhouses, golf, pools, green space, etc., and its size, scale, and diversity of housing choices.
- ▶ Leisure World is hampered by the quality of its housing, specifically the outdated unit finishes and designs in much of its housing. The median age of residents is also highest amongst competitors.
- ▶ The total “Score” of Leisure World is in-line, though generally lower, than the competitive set.

MEDIAN AGE

Residents in Leisure World are older than competitive Active Adult Communities which has created a negative perception in the market as a “retirement community”, not a true “active adult community”.

- ▶ Leisure World's Median Age is 76, the highest amongst the competitive set and well above the average age of 68.5.

HOME SALES

Leisure World's average home price is the lowest in the competitive set, though this is in part due to its larger share of high-rise condominium product. Price appreciation in Leisure World has been modest over the past five years.

- ▶ Leisure World's average home price and price per square foot (\$237,500, \$199 per square foot) is the lowest in the competitive set.
- ▶ Price appreciation at Leisure World over the past five years has been modest, the third lowest of the competitive set.
- ▶ Lower home values have a direct impact on the funds collected by the resale contribution fee, reducing the funds available for capital projects.

AMENITIES

Leisure World's amenity package is one of its biggest competitive advantages as it offers a wide range of amenities and social opportunities for residents.

COSTS AND FEE STRUCTURE

Leisure World has a modest trust fee, but high mutual fees make monthly expenses (before taxes, insurance, etc.) quite high. However, residents still save on total monthly costs (including taxes, insurance, etc.) due to the lower overall home values at the community.

- ▶ Leisure World has a modest trust fee, but mutual fees make Leisure World one of the most expensive communities before factoring in taxes, insurance, and financing costs.
- ▶ Leisure World has the most aggressive capital contribution costs, but still has the lowest entry price due to its lower home values.
- ▶ After factoring in taxes, insurance, and financing costs, Leisure World has the most affordable monthly payment in the competitive set.

LONG-TERM COST ANALYSIS

Leisure World is the most affordable community in terms of total expenses to owners. Fees would need to increase by 2.3x to reach the median ownership costs of the competitive set over a 10-year horizon, or home values would need to increase by 2.4x.

- ▶ Over a 10-year horizon, Leisure World is the most affordable community in terms of total expenses for owners.
- ▶ To reach the median ownership cost in the competitive set over this 10-year horizon, Leisure World would need to increase its monthly fees by 2.3x, or its average home value by 2.4x.

OPPORTUNITY MATRIX

LEISURE WORLD'S AMENITIES AND DIVERSITY OF HOUSING CHOICES PROVIDE A COMPETITIVE ADVANTAGE, BUT ITS UNIT FINISHES, AND MEDIAN AGE OF RESIDENTS IS A COMPETITIVE DISADVANTAGE

To understand Leisure World's place within the regional active adult community ("AAC") market, RCLCO compared Leisure World to 11 AACs within the Washington D.C. area across several factors listed below.

- **Amenity Quantity:** Leisure World has the greatest array of amenities across the competitive set.
- **Amenity Quality (Age):** Leisure World is much older than most of the competitive set, and as such the quality of amenities is not directly comparable to newer AACs in the competitive set.
- **Diversity of Housing Choices:** Leisure World has a wide range of housing product ranging from single-family detached, single-family attached, low-rise, mid-rise, and high-rise condominiums. This mix of product provides the greatest selection of housing products across the competitive set.
- **Unit Finishes:** Unit finishes are severely lacking compared to its competitors, as many units are several decades outdated in terms of unit finishes and design.
- **Median Age:** Leisure World's residents are significantly older than most of the competitive set, creating a negative perception in the marketplace.

Community Characteristic Comparison, Leisure World and Competitive Set; January 2024

Community	Amenity Quantity	Amenity Quality (Age)	Diversity of Housing Choices	Unit Finishes	Median Age	Total Score
Four Seasons at Kent Island	4	5	4.5	4	4	21.5
Potomac Green	2.5	5	4.5	4	4	20
Trilogy at Lake Frederick	4	5	3	3.5	4	19.5
Carter's Mill	3	5	4	3.5	4	19.5
Birchwood at Brambleton	3	5	4.5	3	4	19.5
Regency at Dominion Valley	4.5	4	4.5	3	3	19
Heritage Hunt	4.5	4	4.5	3	2	18
The Woodlands of Urbana	3	5	2	4	4	18
Four Seasons at Historic Virginia	3	4	2	3.5	5	17.5
Two Rivers	2	5	2	4	4	17
Leisure World	5	3	5	1	1	15
Lansdowne Woods of Virginia	4	5	1	3.5	1	14.5

Source: RCLCO

SITE ASSESSMENT

STRENGTHS

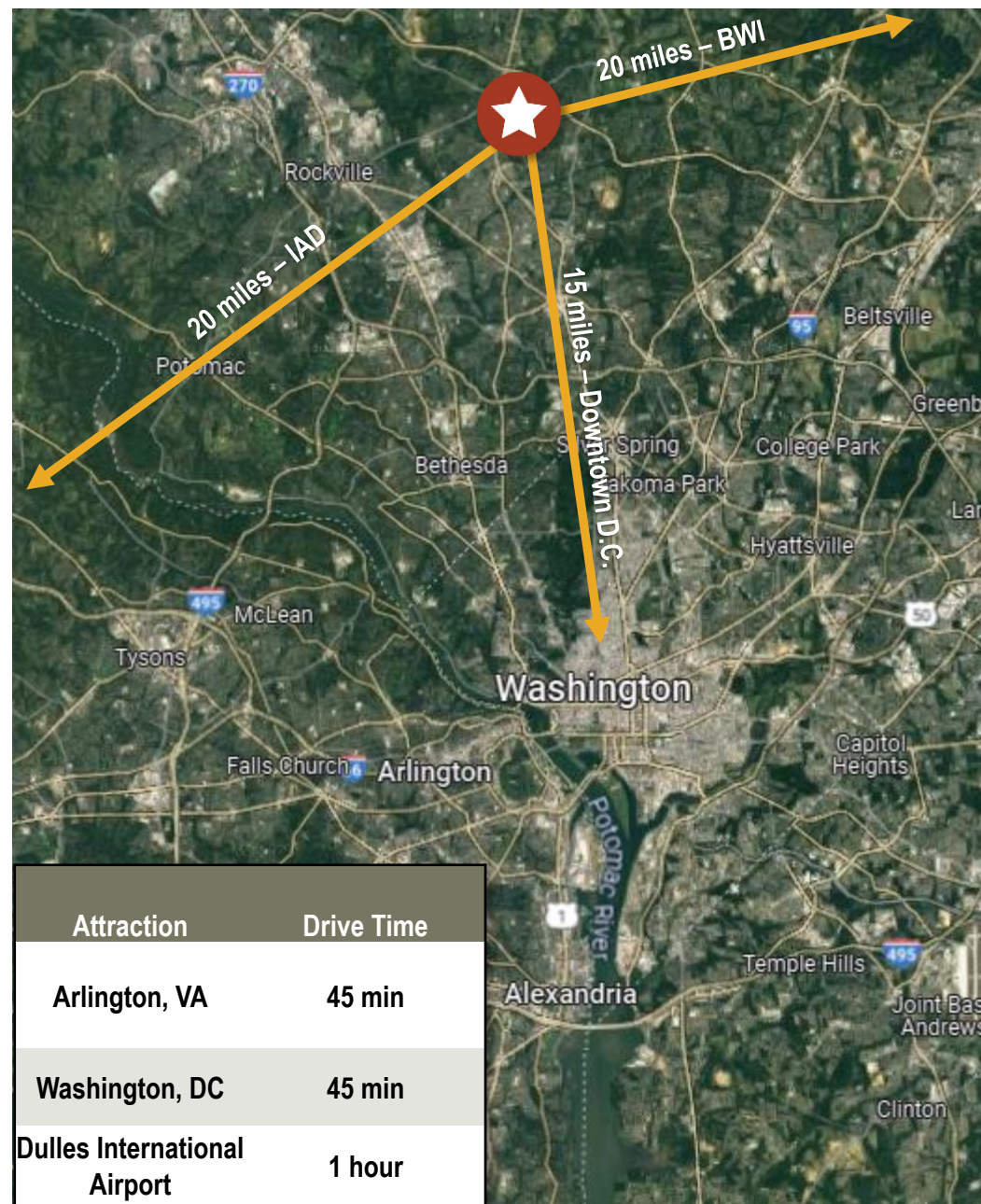
- ▶ Leisure World benefits from its strong amenity package, with two clubhouses, multiple meeting/gathering rooms, golf, pools, green spaces, Chapel, and MedStar Health Center & Pharmacy on site.
- ▶ There is a wide variety of retail and entertainment options within a 10-minute drive time of the site. The site is located within an hour drive of downtown Washington D.C., and an hour from the nearest airport, IAD.

CHALLENGES

- ▶ Residential units on site, on average, have outdated unit finishes and design as many units are several decades outdated.
- ▶ Leisure World's median age is 76, well above the competitive set average age of 68.5. This contributes to the perception of the site as a retirement community rather than a true active adult community.

OPPORTUNITIES

- ▶ Leisure World is the most affordable community of the competitive set in terms of total expenses to owners. Fees would need to increase by 2.3x to reach the median ownership costs of other competitive communities over a 10-year horizon, or home values would need to increase by 2.4x.
- ▶ Allowing “flippers” to purchase in Leisure World by eliminating the initial capital contribution fee (to be paid at resale after renovations have occurred) could help the community to organically update its housing product and increase home values.
- ▶ Rebranding efforts through a name change could also help change the reputation/perception of the community, shifting it to that of a true AAC rather than a retirement community.
- ▶ Building new housing within the community could also help revitalize the standard of housing and perception within the AAC market.



AMENITY COMPARISON

Leisure World offers an impressive array of amenities in comparison to other AACs in the region

MAP KEY

COMMUNITY NAME

TOTAL HOMES

COMMUNITY AMENITIES

	1	2	3	4	5	6	7	8	9	10	11	12
	Leisure World	Trilogy at Lake Frederick	Regency at Dominion Valley	Carter's Mill	Lansdowne Woods of Virginia	Birchwood at Brambleton	Potomac Green	Heritage Hunt	The Woodlands of Urbana	Four Seasons at Historic Virginia	Two Rivers	Four Seasons at Kent Island
	5,725	950	855	480	1,120	1,502	1,363	1,863	565	801	800	1,079
Clubhouse (#)	2	1	1	1	1	1	1	2	1	1	1	1
Clubhouse Size (SF)	117,500	36,000	30,000	14,000	48,000	20,000	29,000	28,000	18,000	21,000	15,000	24,000
Clubhouse SF/ Household	21	38	35	29	43	13	21	15	32	26	19	22
Indoor Pool	X	X	X	X	X	X	X	X		X	X	X
Outdoor Pool	X	X	X	X		X	X	X	X	X	X	X
Golf (# Of Holes)	18		18					18				
Putting Green	X		X					X	X	X		
Golf Simulator						X			X			
Fitness Center	X	X	X	X	X	X	X	X	X	X	X	X
Fitness Studio	X	X	X	X	X		X	X	X	X	X	X
Tennis Courts (#)	3	2	X		2		3	3		2	2	1
Pickleball Courts (#)	4	4	X	2	2	2	6	5	X	4	8	6
Bocce Ball Courts (#)				X		X	2	4	X	3	2	2
Media/Game Room	X				X	X	X		X		X	X
Community Classes	X	X	X	X	X		X	X	X	X	X	X
Studio/Workshop	X	X			X	X		X				
Restaurant/Bar	X	X	X		X	X		X				X
Ballroom/Multi-Purpose	X	X	X	X	X	X		X	X	X	X	X
Walking & Biking Trails	X	X	X	X		X	X		X		X	X
Firepits				X					X		X	X
Garden	X	X							X			
Dog Park		X							X			X
Children's Playground				X		X			X			X

Note: For Amenities with (#) information, "X" is used to denote the presence of an amenity where the exact number is unavailable or not provided

Source: Community Websites

AMENITY COMPARISON

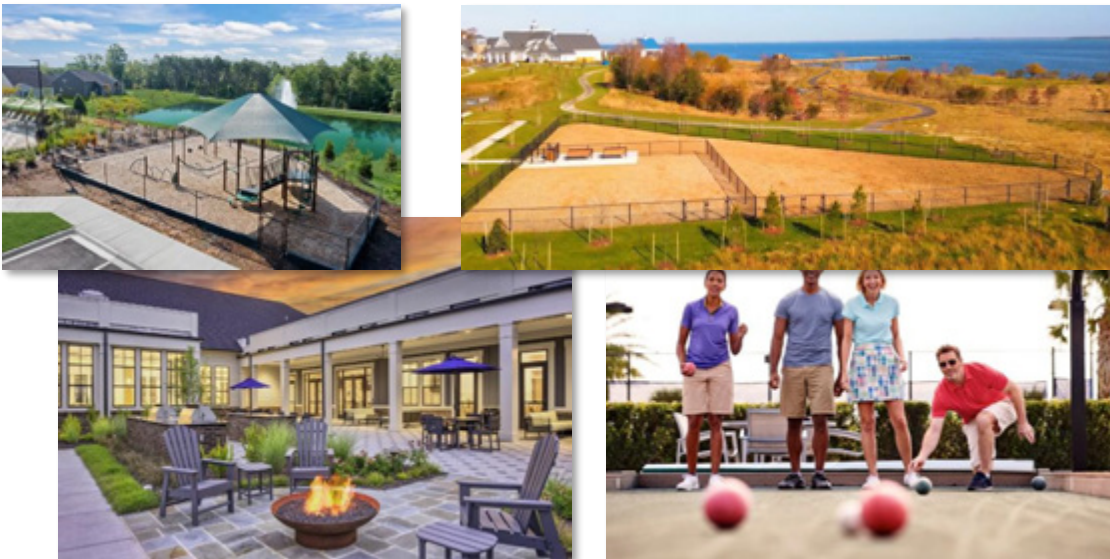
Amenities found at regional competitive active adult communities that are not currently present at Leisure World include bocce ball courts, firepits, dog parks, and children's playgrounds.

Leisure World has a robust offering of amenities but does lack some offerings available at competitive communities. In comparing Leisure World to other regional communities, there appears to be an opportunity for bocce ball courts, firepits, dog parks, and children's playgrounds. While these may not be "headline" amenities, these can typically be developed with a more limited development budget and produce an outsized return in terms of overall value for residents and the community.

With 5,725 residences in Leisure World, the community's current sports court offering of three tennis courts and four pickleball courts is comparable to the offerings of the competitive set, but much lower per resident given that Leisure World is by far the largest AAC. Given the number of households at Leisure World, there would need to be 3 – 4 times the number of tennis courts, and 4 – 6 times the number of pickleball courts to reach the competitive set's average and median number of courts per household. Using this ratio of courts to households, Leisure World could also support approximately 12 bocce ball courts.

As we understand the situation, the golf course at Leisure World is currently hosting approximately 22,000 rounds annually, which is below the traditional capacity of between 30,000 and 34,000 rounds per year for a standard golf course. While this may be partially due to the golf course restricting rounds in early morning and late evening to reserve the course for walking, it is still operating below capacity. Only two regional active adult communities offer golf, and many communities across the country have found success in offering a more limited golf amenity, including 9-hole or executive courses, while preserving open space and walking trails within their communities.

Additional Amenities (Carter's Mill; Four Seasons at Kent Island)



Saddlebrook Ranch Pickleball Club, Oracle, AZ



Source: Community Websites

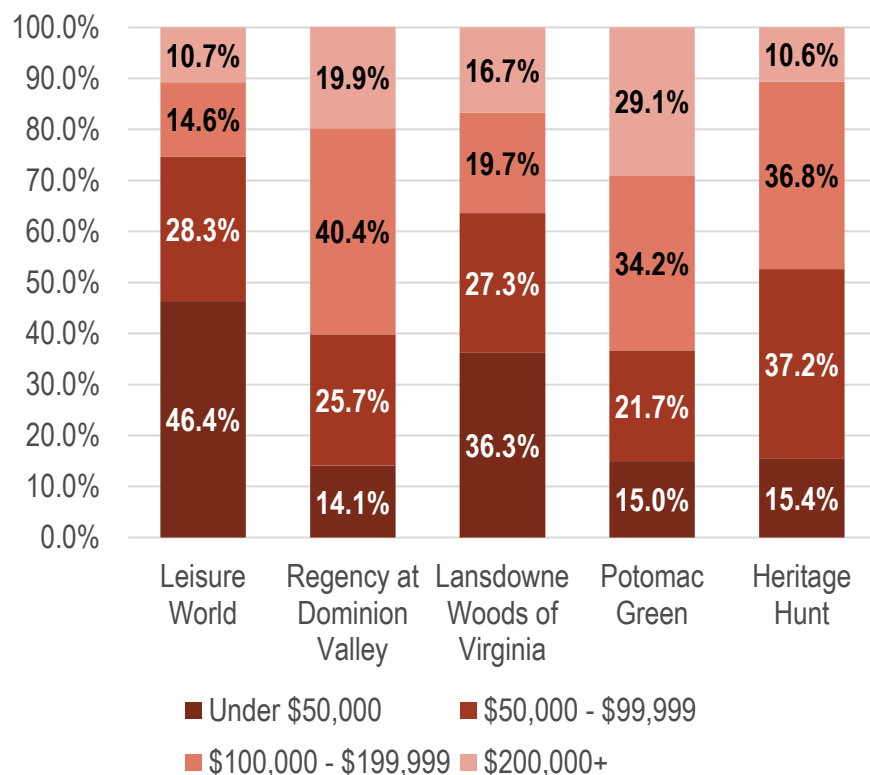
LEISURE WORLD AND ACTIVE ADULT DEMOGRAPHICS

Leisure World is older and less affluent than its competitors

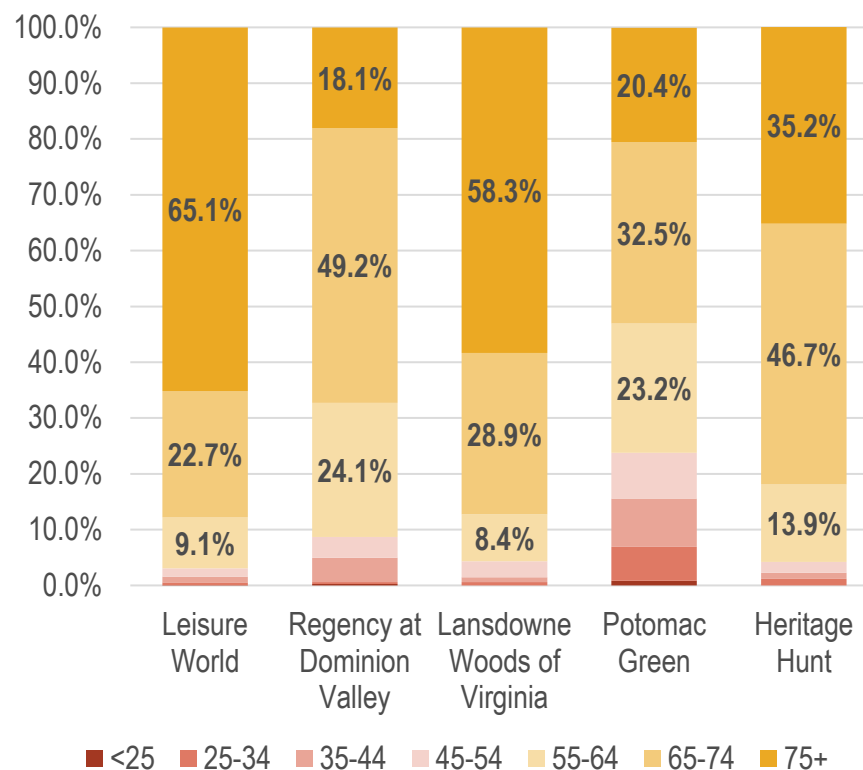
RCLO compared Leisure World's current demographics to select competitive AACs (Regency at Dominion Valley, Lansdowne Woods of Virginia, Potomac Green, and Heritage Hunt) using data provided by Esri.

- ▶ Leisure World is less affluent compared to other AACs as approximately 46.4% of households earn \$50,000 or less annually, compared to an average of 20.2% at competitive AACs. However, this is partly due to the product mix of high-rise condominiums at Leisure World, as its household distribution by income segments is similar to that of *Lansdowne Woods of Virginia*.
- ▶ Leisure World's median age is 76, and approximately 65% of residents are 75 and older. The median age at competitive AACs is 68.5, though *Lansdowne Woods of Virginia* shares a similar distribution by age due to its similar mix of high-rise condominium product.

Household Distribution by Income Segment
Leisure World and Select Competitive AACs; 2023



Household Distribution by Age Segment
Leisure World and Select Competitive AACs; 2023



Source: Esri

RESIDENTIAL SALES ANALYSIS

Leisure World has the lowest average residential selling price, and price appreciation over the past five years has been on the lower end of the competitive set

RCLCO analyzed residential sales at Leisure World and the competitive set over the past five years. Shown in the table below is the average selling price, home size, and price per square foot for residential units sold over the past 12 months, along with price appreciation figures for the past five years.

- Leisure World's average selling price was \$237,500 over the past 12 months, far lower than any other competitor. Leisure World's average selling price is hampered by the age of its residential units, and overall quality of the unit finishes as many residences have not been updated for decades. Leisure World's average price point is also more representative of high-rise condominium units, which are smaller and less expensive than single-family homes.
- Price appreciation at Leisure World has been modest over the past five years, as the average home price square foot rose by \$37, or 4.2% annually. On a percentage basis, this appreciation was third lowest in the competitive set, but ahead of *Lansdowne Woods of Virginia* and *Four Seasons at Historic Virginia*. Nationally, home prices in the United States grew by 8.74% annually during this period, according to the Case-Shiller Index.

Home Sales Comparison, Leisure World and Competitive Set; January 2024

Map Key	Community	Avg. Price Point	Avg. Size	Avg. \$/SF	Price Appreciation (Nov '18 - Nov '23)	Annual Price Appreciation (%) (Nov '18 - Nov '23)
1	Leisureworld	\$237,500	1,194	\$199	\$37	4.2%
2	Trilogy at Lake Frederick	\$565,000	2,550	\$222	\$60	6.5%
3	Regency at Dominion Valley	\$640,000	2,422	\$264	\$62	5.5%
4	Carter's Mill	\$657,905	2,313	\$284	N/A	N/A
5	Lansdowne Woods of Virginia	\$390,000	1,428	\$273	\$49	4.1%
6	Birchwood at Brambleton	\$606,096	1,997	\$304	N/A	N/A
7	Potomac Green	\$695,000	2,248	\$309	\$92	7.3%
8	Heritage Hunt	\$625,000	2,520	\$248	\$67	6.5%
9	The Woodlands of Urbana	\$528,018	1,639	\$322	N/A	N/A
10	Four Seasons at Historic Virginia	\$545,750	2,727	\$200	\$24	2.6%
11	Two Rivers	\$740,000	3,252	\$228	N/A	N/A
12	Four Seasons at Kent Island	\$671,250	2,016	\$333	\$107	8.0%

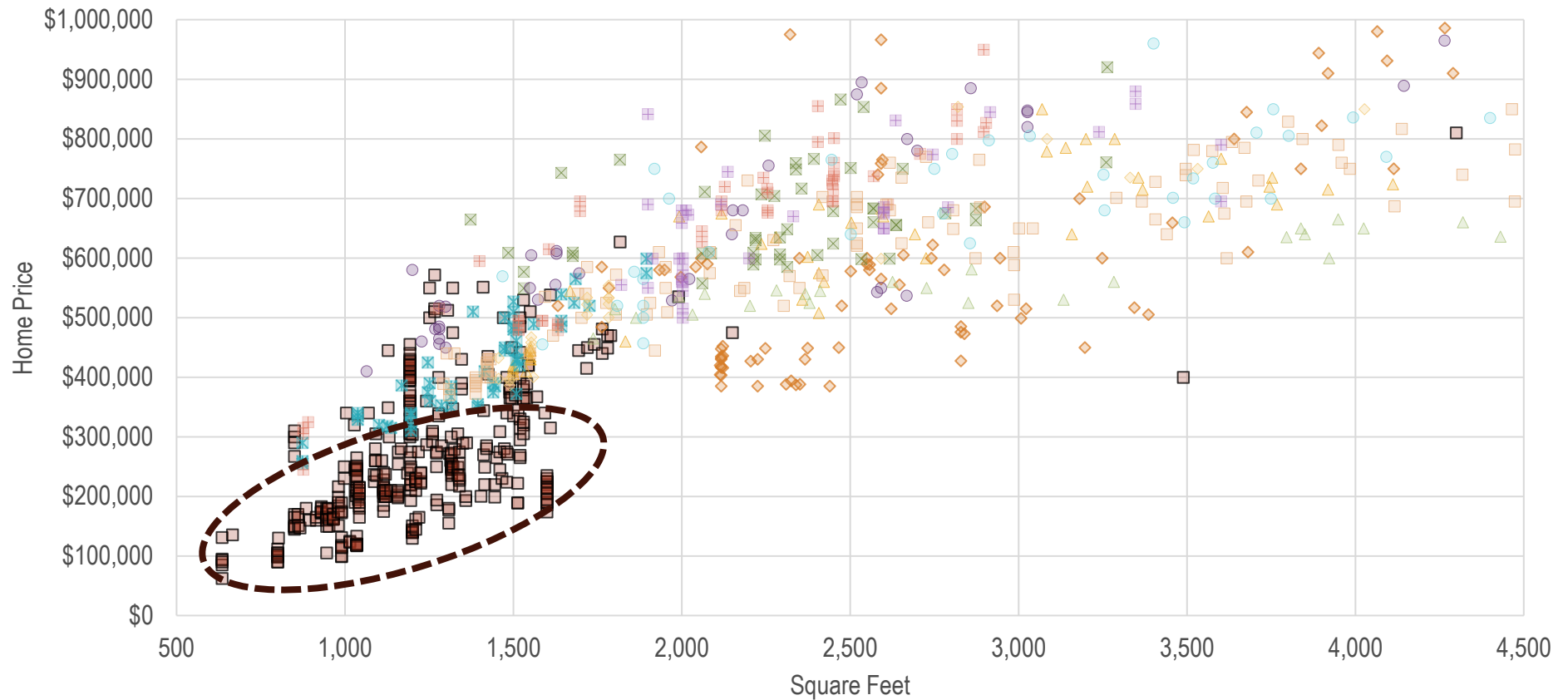
Source: Redfin; RCLCO

PRICE TO SIZE COMPARISON

Leisure World's residences are among the smallest and lowest priced in the competitive set

A majority of Leisure World's sales are concentrated between 750 – 1,600 square feet, which represents the smallest product in the competitive set limiting the pricing power of residences.

Price to Size Comparison, Leisure World and Competitive Set; November 2022 – November 2023



- Leisure World
- Trilogy at Lake Frederick
- Regency at Dominion Valley
- Carter's Mill
- Lansdowne Woods of Virginia
- Birchwood at Brambleton
- Potomac Green
- Heritage Hunt
- The Woodlands of Urbana
- Four Seasons at Historic Virginia
- Two Rivers
- Four Seasons at Kent Island

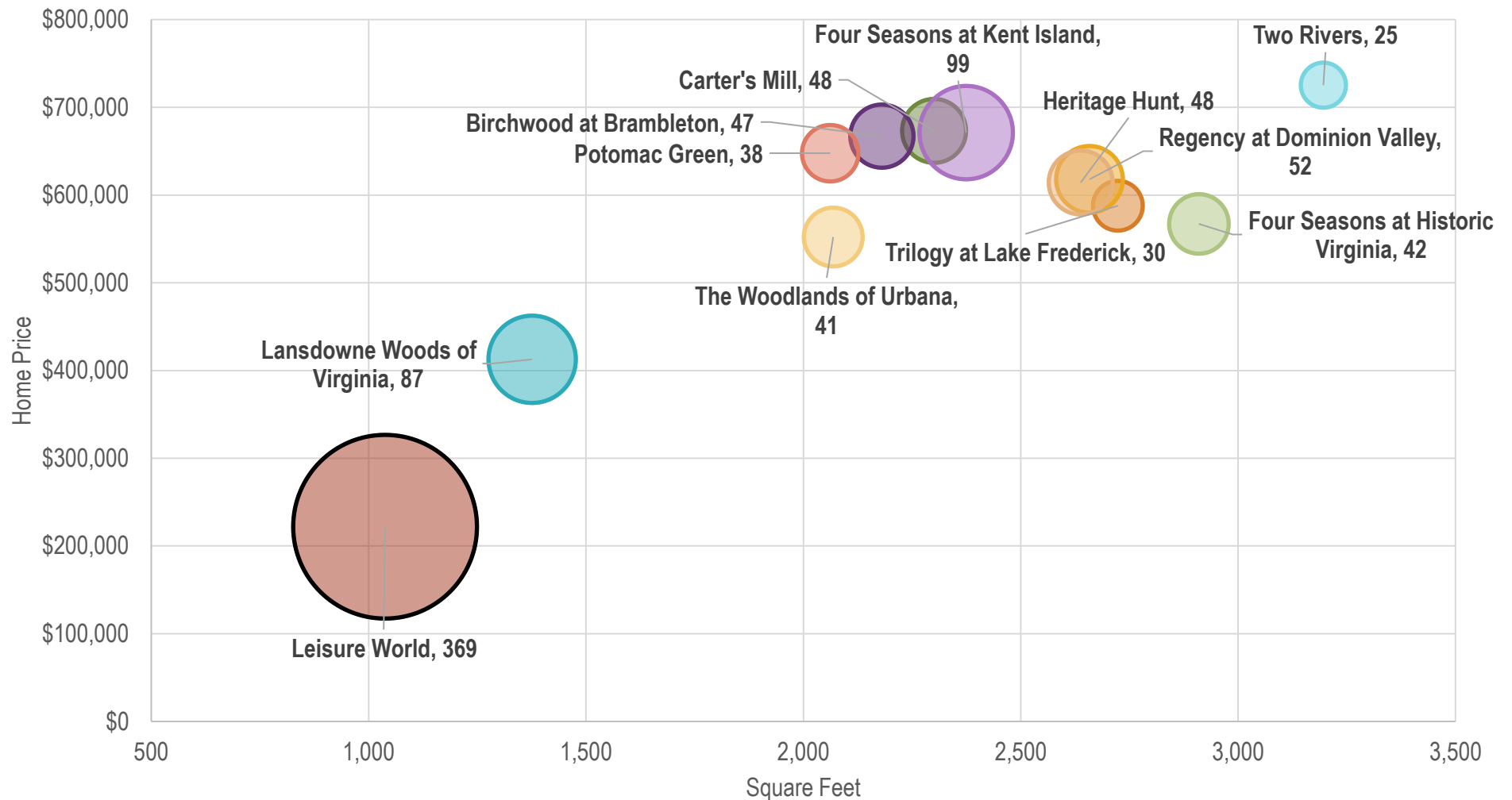
Source: Redfin; RCLCO

PRICE TO SIZE COMPARISON

Leisure World has the largest residential resale market in the competitive set

Competitive AACs average approximately 50 residential sales per year. Leisure World is the largest AAC in the competitive set, and typically sells over 300 resale homes per year, a pace 7.4 times that of the competitive set average.

Average Selling Price, Average Home Size, and Total Sales, Leisure World and Competitive Set; November 2022 – November 2023



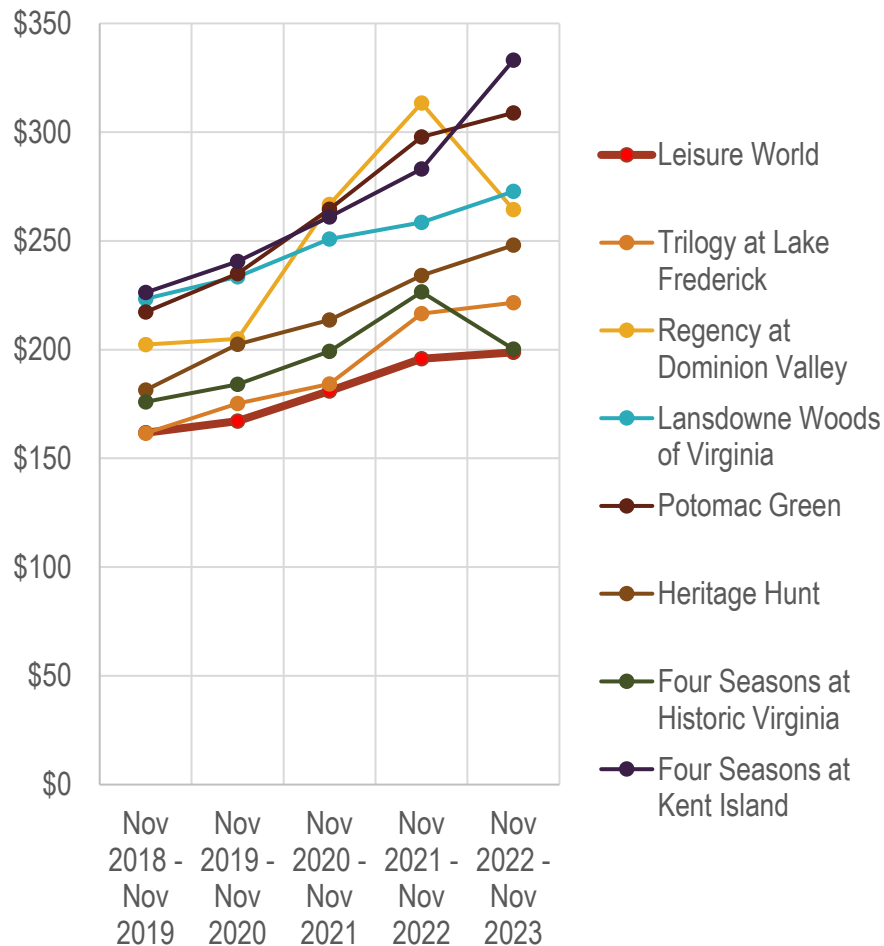
Source: Redfin; RCLCO

PRICE APPRECIATION

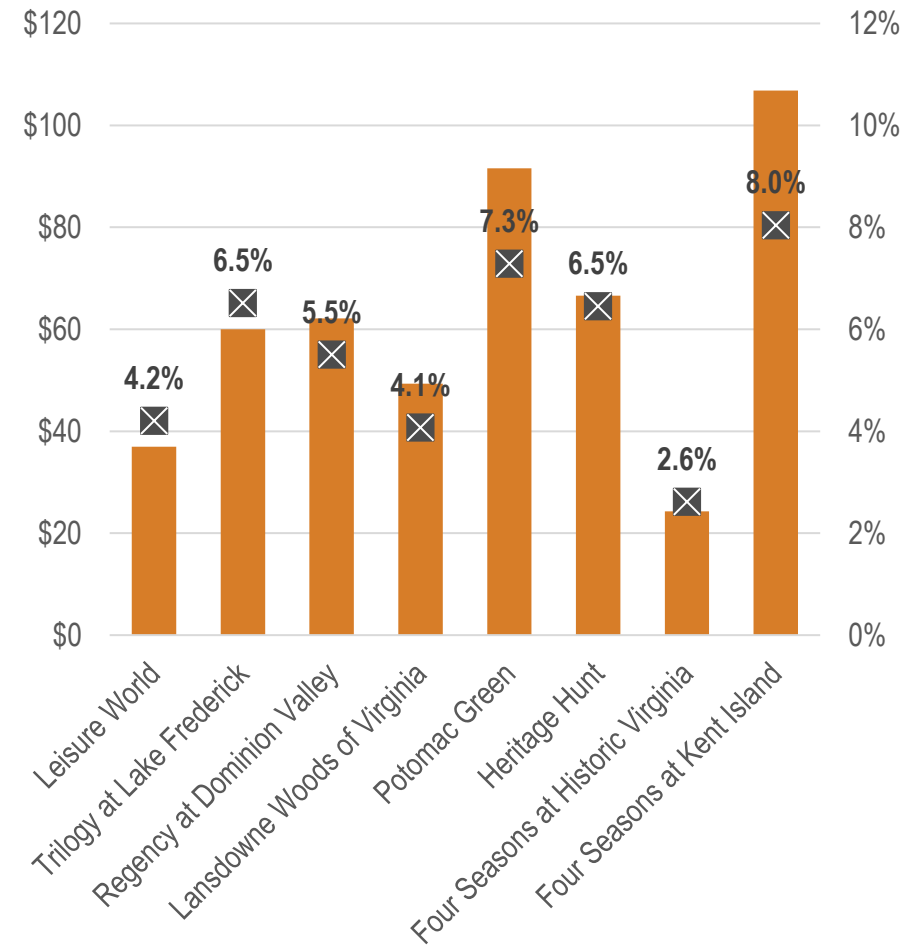
Leisure World's price appreciation over the past five years has been modest, as the average price per square foot grew by 4.2% annually

Leisure World's average home price grew from \$195,750 to \$237,500 over the past five years. This 4.2% annual increase is slightly below the average price increase of 5.8% across the competitive set (only including those who were actively selling all five years), but above *Lansdowne Woods of Virginia*.

Annual Price Per Square Foot Appreciation, Leisure World and Competitive Set; November 2018 – November 2023



Total Price Per Square Foot and Annual Appreciation Rate, Leisure World and Competitive Set; November 2018 – November 2023



Source: Redfin; RCLCO

OWNERSHIP COSTS AND FEE STRUCTURES

Leisure World has high monthly condominium fees, but after factoring in payment for insurance, taxes, and mortgages, Leisure World is comparatively cheaper than its competitors given its lower overall home values

To understand how ownership at Leisure World impacts its residents, RCLCO analyzed the long-term costs (10-years) associated with ownership (Trust/HOA fees, condominium fees, insurance, property taxes, and mortgage costs). Leisure World is still the cheapest AAC to own in despite its high monthly condominium fees.

- To reach the median cost to owners across the competitive set, Leisure World would either need to increase its monthly fees by 2.3x or increase its average home price by 2.4x.

Costs and Fee Analyses, Leisure World and Competitive Set; January 2024

Community	Leisure World	Trilogy at Lake Frederick	Regency at Dominion Valley	Carter's Mill	Lansdowne Woods of Virginia	Birchwood at Brambleton	Potomac Green	Heritage Hunt	The Woodlands of Urbana	Four Seasons at Historic Virginia	Two Rivers	Four Seasons at Kent Island
Monthly Costs and One-Time Fees												
Monthly Trust/HOA Fees	\$237	\$303	\$276	\$225	\$188	\$269	\$277	\$335	\$220	\$261	\$244	\$205
Monthly Condominium/Mutual Fee	\$877	N/A	N/A	N/A	\$497	\$378	\$314	\$320	N/A	N/A	N/A	\$170
Total Association Fees Before Insurance, Taxes, etc.	\$1,114	\$303	\$276	\$225	\$685	\$647	\$591	\$655	\$220	\$261	\$244	\$375
Capital Contribution Fees	\$7,125	\$2,300	\$3,272	\$0	\$994	\$0	\$628	\$3,960	\$0	\$1,500	\$0	\$0
Total Entry Price (20% Down + Capital Contribution)	\$54,625	\$115,300	\$131,272	\$131,581	\$78,994	\$121,219	\$139,628	\$128,960	\$105,604	\$110,650	\$148,000	\$134,250
Monthly Insurance, Taxes, and Mortgage Costs	\$1,451	\$3,315	\$3,742	\$3,843	\$2,319	\$3,549	\$4,054	\$3,656	\$3,104	\$3,205	\$4,311	\$3,919
Total Monthly Payment	\$2,565	\$3,618	\$4,018	\$4,068	\$3,004	\$4,196	\$4,645	\$4,311	\$3,324	\$3,466	\$4,555	\$4,294
Long-Term Cost Analysis												
10 Year Ownership Costs Median (Excluding Leisure World)	\$307,842	\$434,134	\$482,103	\$488,208	\$360,426	\$503,473	\$557,456	\$517,341	\$398,923	\$415,950	\$546,541	\$515,320
Leisure World Monthly Fees to Reach Median 10 Year Ownership Costs	\$2,617	2.3x										
Leisure World Avg. Price to Reach Median 10 Year Ownership Costs	\$567,921	2.4x										

Source: Redfin; RCLCO

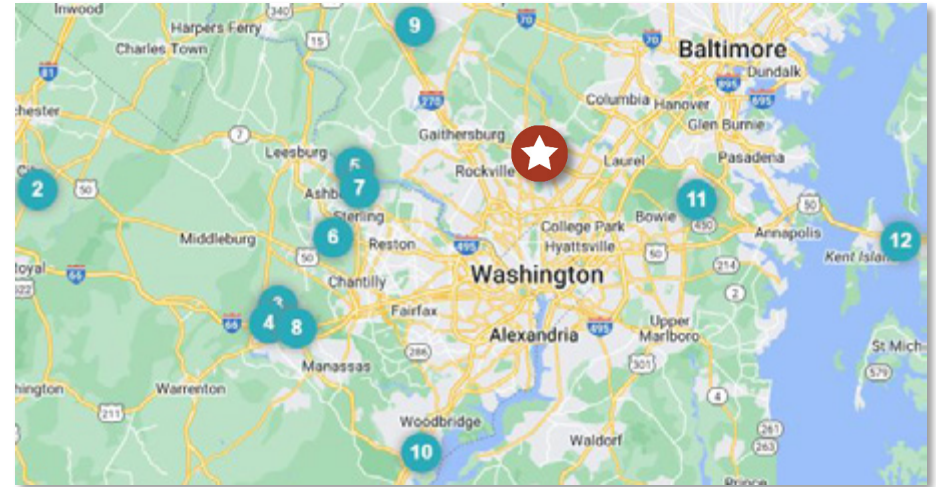
COMPETITIVE SUPPLY

LEISURE WORLD IS MUCH OLDER THAN THE COMPETITIVE SET, THOUGH IS CLOSER TO WASHINGTON D.C. THAN ITS COMPETITION

RCLCO surveyed Leisure World and 11 active adult communities in the greater Washington D.C. area for their home prices, home products, home sizes, annual sales, price appreciation, and amenities.

- Leisure World's average sales price is the lowest in the competitive set (though this is partly due to large share of high-rise condominium product). It is the largest AAC by scale and total number of units, and as such is selling more homes than any competitor on an annual basis.
- See the following pages for an amenity overview for each competitor.

Competitive Supply Map, Washington D.C. Area; January 2024



Competitive Supply Overview, Washington D.C. Area; January 2024

Map Key	Community	Location	First Year of Operations	Homes Planned/ Entitlements	Avg. Home Price	Avg. Home Size	Avg. Price/ SF	Annual Sales	5-Year Price Appreciation
1	Leisure World	Silver Spring, MD	1966	6,185	\$237,500	1,195	\$199	369	21%
2	Trilogy at Lake Frederick	Lake Frederick, VA	2006	950	\$565,000	2,550	\$222	87	25%
3	Regency at Dominion Valley	Haymarket, VA	2001	855	\$640,000	2,420	\$264	47	34%
4	Carter's Mill	Haymarket, VA	2020	480	\$658,000	2,315	\$284	48	
5	Lansdowne Woods of Virginia	Lansdowne, VA	1998	1,120	\$390,000	1,430	\$273	52	18%
6	Birchwood at Brambleton	Brambleton, VA	2016	1,502	\$606,000	1,995	\$304	42	
7	Potomac Green	Ashburn, VA	2005	1,363	\$695,000	2,250	\$309	48	35%
8	Heritage Hunt	Gainesville, VA	1998	1,863	\$625,000	2,520	\$248	99	33%
9	The Woodlands of Urbana	Frederick, MD	2019	565	\$528,000	1,640	\$322	30	
10	Four Seasons at Historic Virginia	Dumfries, VA	2002	801	\$545,750	2,725	\$200	25	24%
11	Two Rivers	Odenton, MD	2015	800	\$740,000	3,250	\$228	41	28%
12	Four Seasons at Kent Island	Chester, MD	2018	1,079	\$671,250	2,015	\$333	38	41%
Average			2005	1,464	\$575,250	2,190	\$263	77	29%
Median			2006	1,015	\$615,500	2,285	\$269	48	28%

Source: Redfin; Community Websites; RCLCO

COMPETITIVE SUPPLY

2. Trilogy at Lake Frederick

Trilogy at Lake Frederick is centered around Lake Frederick Virginia approximately 60 miles west of Washington D.C.. Developed by Shea Homes, the community offers new homes ranging from \$445,990 - \$919,000.

- **Key Amenities:** Shenandoah Lodge & Athletic Club (36,000* square feet); Fitness Center; Tennis; Pickleball; Golf Simulator; Lake Access; Restaurant (Region's 117); Café (Market Place); Indoor and Outdoor Pool; Trails; Dog Parks; 49 Resident Clubs

3. Regency at Dominion Valley

Regency of Dominion Valley is 35 miles west of Washington D.C. along I-66 in Haymarket, Virginia and features resale single-family homes and condominiums.

- **Key Amenities:** 30,000 Square Foot Clubhouse; Regency at Dominion Valley Golf Course (18-holes); Fitness Center; Tennis; Indoor and Outdoor Pool; Restaurant (Middleburg Grill); Trails; Amphitheater; 30+ Member Clubs

4. Carter's Mill

Built by Del Webb, Carter's Mill is one of the newest active-adult communities in the Washington D.C. area. Located near Regency at Dominion Valley in Haymarket, Virginia, Carter's Mill will feature 480 total homes, the smallest community in the competitive set.

- **Key Amenities:** Buckland House (14,000 Square Foot Clubhouse); Indoor and Outdoor Pool; Fitness Center; Pickleball; Trails; Lifestyle Director

**Includes both indoor and covered outdoor areas*

Shenandoah Lodge & Athletic Club, Trilogy at Lake Frederick



Buckland House, Carter's Mill



Source: Redfin; Community Websites; RCLCO

COMPETITIVE SUPPLY

5. Landsdowne Woods of Virginia

Landsdowne Woods of Virginia has a collection of high-rise condominium resales set in 46-acres along the Potomac River and overlooks The Golf Club at Landsdowne approximately 25 miles northwest of Washington D.C. in Leesburg, Virginia. Landsdowne Woods is tied with Heritage Hunt as the oldest community in the competitive set after Leisure World.

- **Key Amenities:** 48,000 Square Foot Clubhouse; Fitness Center; Tennis; Pickleball; Indoor Pool; Restaurant; 50+ Resident Clubs

6. Birchwood at Brambleton

Birchwood at Brambleton offers new condominiums, brownstones, courtyards, and single-family homes in an age-qualified community within the successful Brambleton master-planned community near the Dulles International Airport.

- **Key Amenities:** 20,000 Square Foot Clubhouse; Fitness Center; Pickleball; Outdoor and Indoor Pool; Trails; Golf Simulator; Playground; Adjacent to Commercial Village

7. Potomac Green

Located in Ashburn, Virginia 25 miles northwest of Washington D.C., Potomac Green has over 1,000 single-family, villas, and resale condominiums.

- **Key Amenities:** 29,000 Square Foot Clubhouse; Fitness Center; Tennis; Pickleball; Indoor and Outdoor Pool; Lifestyle Director; Trails; Dog Park

Landsdowne Woods of Virginia



Clubhouse, Birchwood at Brambleton



Source: Redfin; Community Websites; RCLCO

COMPETITIVE SUPPLY

8. Heritage Hunt

Heritage Hunt covers over 750 acres in Gainesville, Virginia 30 miles southwest of Washington D.C., and offers resale homes. It is the largest community in the competitive set aside from Leisure World with 1,863 total homes and 3,400 residents

- **Key Amenities:** Residents Clubhouse; Heritage Hunt Country Club (18-holes); Golf Clubhouse; Fitness Center; Tennis; Pickleball; Indoor and Outdoor Pool; Restaurant (Red Oak Bar & Grill)

9. The Woodlands of Urbana

The Woodlands of Urbana is one of the newest, but smallest AAC communities in the competitive set with just 565 homes and is approximately 33 miles northwest of Washington D.C. in close proximity to I-270.

- **Key Amenities:** The Lodge Clubhouse (18,000 square feet); Fitness Center; Outdoor Pool; Pickleball; Trails; Dog Park; Playground; Putting Green; Golf Simulator

10. Four Seasons at Historic Virginia

Four Seasons at Historic Virginia covers approximately 450 acres in Dumfries Virginia adjacent to I-95 and has 1,400+ residents in 801 resale homes.

- **Key Amenities:** 21,000 square foot clubhouse; Fitness Center; Indoor and Outdoor Pool; Tennis; Pickleball; 50+ Resident Interest Groups; Putting Green

Pool and Clubhouse, Heritage Hunt



The Lodge Clubhouse, The Woodlands at Urbana



Source: Redfin; Community Websites; RCLCO

COMPETITIVE SUPPLY

11. Two Rivers

Two Rivers is approximately 19 miles northeast of Washington D.C. and is one of just two competitors located east of D.C. as most AAC communities have been established in the suburbs of Virginia to the west of the city. As part of a larger master-planned community, residents of the AAC neighborhoods in Two Rivers enjoy their own, private gated community and amenities, but also can enjoy the greater sense of community and amenities provided by the non-age-qualified neighborhoods.

- **Key Amenities:** Village Club (15,000 square feet); Access to Hamlet Clubhouse (All Ages 10,000 square foot clubhouse); Fitness Center; Indoor and Outdoor Pool; Tennis; Pickleball; Trails

12. Four Seasons at Kent Island

Located 40 miles east of Washington D.C. Four Seasons at Kent Island offers both new and resale homes. It benefits from its frontage directly on the Chester River providing great views of the water and water access for its 1,000+ homes built by K. Hovnanian.

- **Key Amenities:** 24,000 Square Foot Clubhouse; Indoor and Outdoor Pool; Fitness Center; Tennis; Pickleball; Lifestyle Director; Dog Park; Trails; Amphitheatre; Pier; Kayak Launch

Village Club, Two Rivers



Clubhouse, Four Seasons at Kent Island



Source: Redfin; Community Websites; RCLCO

Task 3: Assessment and Choices/Options

Original: April 23, 2024

Updated: September 3, 2024

RECOMMENDATION FOR DISPOSITION OF PROJECTS

Each project was evaluated on several criteria related to competitiveness in the Active Adult Community market, impact on Leisure World's lifestyle offerings, magnitude of financial impact on Leisure World, and other key factors.

Taking into consideration the 30-year planning horizon, each project was evaluated on the extent to which it benefits Leisure World overall, including its current and potential future residents, along with its stated goals and aspirations. Several potential projects were provided by the management group at Leisure World, and others have been identified through collaboration with the consulting group and Leisure World management.

Criteria in Evaluating Key Projects:

- ▶ Will this project help to make Leisure World more competitive to future residents, from a market perspective, in the context of best-in class comparable active-adult communities?
- ▶ Does this project align with national amenity preferences and trends seen in the development of other active-adult communities?
- ▶ Will this project help rejuvenate the lifestyle offered at Leisure World, and support its population over the planning horizon including current and future residents?
- ▶ Will this project help Leisure World be more sustainable over the planning horizon?
- ▶ If a project does not directly generate revenue, do its advantages support the cost of development in terms of elevating Leisure World's status in the regional active adult market?
- ▶ What aspects of Leisure World does this project benefit (subset of owners/individual clubs vs. community at large)?

Projects for Consideration:

- ▶ Community Dog Park; Entrance/ Signage; Expansion of Pickleball Facilities; Greenspace; Golf; Clubhouses; New Housing; Norbeck Gate Configuration; Outdoor Swimming Pool Complex; Children's Playground; Bike Lanes; Leisure World Labyrinth; Auditorium Complex; Wood Shop Expansion

See the following pages of this report for specific project recommendations.

RECOMMENDATION FOR DISPOSITION OF PROJECTS

Project	Description of Project	Cost Estimate (\$)	Cost Estimate	Recommended Priority	Recommendation	Rationale/ Needs Met	Recommendation
Community Dog Park	Add dedicated dog park	\$150k	Low	High	Construct a dog park. Consider separate small- and large-breed parks. Also consider a pet wash/dog-spa, and additional pet waste stations around Leisure World's paths	Low cost and high return on investment in terms of marketing and usability. Provides another social opportunity for pet owners	Proceed
Entrance/ Signage	Improve entrances and guardhouses along with community signage	N/A	Low	High	Update the entrances and guardhouses where possible to create a greater first impression upon entrance to Leisure World. Improve signage throughout Leisure World, both inside and outside the gates	Entrance monuments, guardhouses, and signage are the first impression that prospects and residents get to see. The current entrances are underwhelming and could be improved with an entrance monument, signage, and modern guardhouses	Proceed
Expansion of Pickleball Facilities	Construct new pickleball only courts	\$25k - \$35k	Low	High	Construct new pickleball facility with dedicated courts (nets and lines) for strictly pickleball use. Leisure World could support between 12 - 20 new courts. Consider having at least one lit court with seating to host tournaments	Low cost and high return on investment in terms of marketing and usability. Pickleball is rapidly growing, and more courts are needed to be competitive amongst AACs	Proceed

Note: Cost Estimate was provided by Leisure World. N/A indicates cost estimate was not provided.

RECOMMENDATION FOR DISPOSITION PROJECTS

Project	Description of Project	Cost Estimate (\$)	Cost Estimate	Recommended Priority	Recommendation	Rationale/ Needs Met	Recommendation
Greenspace	Establish new greenspace and trails accessible 24/7 by all residents	N/A	Low	High	Create new dedicated greenspaces for all residents to use and enjoy	With the resizing of the golf course to better meet its demand potential, more dedicated greenspace could be established for 24/7 access by residents not restricted by golfing hours. Greenspace is a highly desired amenity, and creating more greenspace infrastructure through dedicated walking paths and trails will further improve the connectivity of the community	Proceed
Golf	Resize golf course to better meet demand for rounds and allow more residents to access greenspace	N/A	Medium	High	Reconfigure the golf course to a 9-, 12-, or 15-hole course to better align with the current level of demand for golf rounds and free up open space for all residents to enjoy	While the open space provided by the golf course is appreciated by many in the community, it underperforms in terms of resident generated rounds of play and revenue. Resizing the number of holes of golf would preserve golf for those who enjoy playing, while freeing up additional space that could be used to meet other open space needs, trails, and a portion of that could be used for development that would generate new HOA revenue	Proceed
Clubhouses	Update Clubhouse I and II with new design and finish level standards	N/A	High	High	Improve the designs and finishes of the clubhouse. Updates should include tile flooring, updated color palette, modern furniture, a virtual tour on the website	Other competitive AACs have entered the market and feature more modern clubhouses. To be competitive with this growing market, the Clubhouses should reflect these more modern preferences	Proceed

Note: Cost Estimate was provided by Leisure World. N/A indicates cost estimate was not provided.

RECOMMENDATION FOR DISPOSITION PROJECTS

Project	Description of Project	Cost Estimate (\$)	Cost Estimate	Recommended Priority	Recommendation	Rationale/ Needs Met	Recommendation
New Housing	Construct new housing units	N/A	High	High	Leisure World should look to construct new units where feasible. New housing should be dense (likely midrise and/or high-rise condominiums) and can be priced at a significant premium to existing product	New housing at Leisure World creates a one-time revenue from the sale of units, and also creates recurring revenues from additional trust fees. New residences will also allow Leisure World to reach a new demographic of consumer with new and higher priced products	Proceed
Norbeck Gate Configuration	Alleviate traffic problems associated with the backups at the Norbeck Gate	N/A	High	High	Pursue options to alleviate traffic and safety concerns caused by backups at the Norbeck Gate	Addressing safety issues is a top priority to ensure residents are able to keep their sense of security. Additionally, less backups at the gate provide a better first impression for visitors and prospects	Proceed
Outdoor Swimming Pool Complex	Replace the outdoor complex	\$3m - \$5m	High	High	Replace the outdoor pool complex with a new and modern facility. Consider features such as cabanas, fire pits, seating areas and the pool itself should feature zero-entry design and ADA entry	The outdoor pool complex is quite dated and will need to be replaced soon. The outdoor pool complex in other AACs is more than just the pool, but rather serves as a gathering place for social activities	Proceed

Note: Cost Estimate was provided by Leisure World. N/A indicates cost estimate was not provided.

RECOMMENDATION FOR DISPOSITION PROJECTS

Project	Description of Project	Cost Estimate (\$)	Cost Estimate	Recommended Priority	Recommendation	Rationale/ Needs Met	Recommendation
Children's Playground	Add dedicated gathering spaces (playgrounds/ play areas) for grandchildren, and consider soft-programming (summer camps, grandkids weekends, etc.)	N/A	Low	Medium	Construct gathering spaces such as playgrounds and dedicated play areas for grandchildren. Soft-programming such as summer camps, grandkids' weekends, and more can further connect residents with their families	Having dedicated space for visiting grandchildren within the gates of Leisure World (instead of local parks outside the gates) will allow residents to be more connected with families, and improve Leisure World's competitiveness with other AACs	Proceed
Bike Lanes	Construct bike lanes within the community	N/A	Medium	Medium	Construct bike lanes within Leisure World to accommodate bikers, and connect these trails to the larger trail network through Leisure World's greenspace	Dedicated bike lanes will encourage residents to be more active by providing a safe space for bikers	Proceed
Leisure World Labyrinth	Build a labyrinth for meditative walking	\$10k	Low	Low	Construct a labyrinth for meditative walking. Likely to be done concurrent with establishing new greenspaces in Leisure World	At such a low cost this simple amenity can improve the green space and desire for more dedicated walking areas in Leisure World	Proceed

Note: Cost Estimate was provided by Leisure World. N/A indicates cost estimate was not provided.

Source: RCLCO

RECOMMENDATION FOR DISPOSITION PROJECTS

Project	Description of Project	Cost Estimate (\$)	Cost Estimate	Recommended Priority	Recommendation	Rationale/ Needs Met	Recommendation
Auditorium Complex	Renovate the auditorium with modern lighting, sound, acoustics, seating, and accommodations	\$5m	High	Low	Hold until funds can be allocated for higher priority projects	Expense does not likely justify cost. An indoor auditorium is not an up-to-date amenity needed to be competitive in the AAC market. While this would be a "nice to have" it is not a "need to have"	On-Hold
Wood Shop Expansion	Add a 4,500 square foot addition to Clubhouse I for the growing membership	\$1.8 - \$2m	High	Low	Hold until funds can be allocated for higher priority projects	Expense does not likely justify cost. The wood shop/maker's space that exists today is already above and beyond what other AACs offer. While this would be a "nice to have" it is not a "need to have"	On-Hold

Note: Cost Estimate was provided by Leisure World. N/A indicates cost estimate was not provided.

Source: RCLCO

INTERIOR AND EXTERIOR FACILITIES RECOMMENDATIONS: CLUBHOUSES

Clubhouses

- ▶ Description: Clubhouse I and II while spacious, are quite dated and lack the updated design and finishes seen at other AACs.
 - » Clubhouse I: Restaurants (Terrace Room, Stein Room, Clubhouse Grille); Crystal Ballroom; Library; Art Studio; Wood Shop; Outdoor Pool and Lanai
 - » Clubhouse II: Fitness Center; Indoor Pools; Tennis and Pickleball Courts; Auditorium; Ceramics Studio; Computer Center
- ▶ Recommendation: Update the clubhouses to current design and finish level standards.
 - » Tile flooring; Updated Color Palette; Modern Furniture; Virtual Tour on Website; Firepits; Outdoor Seating and Gathering Area

Leisure World Clubhouse I



Four Seasons at Kent Island Clubhouse



Woodlands of Urbana Clubhouse



Woodlands of Urbana Clubhouse



Source: Community Websites; RCLCO

INTERIOR AND EXTERIOR FACILITIES RECOMMENDATIONS: GOLF AND GREENSPACE

Golf and Greenspace

- Description: Golf course is underutilized and is not a revenue generator.
- Recommendation: Shrink the footprint of the golf course to expand the dedicated greenspace, while still offering golfers a 9 – 15-hole golf course.
 - » Other golf amenities besides a course can include golf simulator(s) and putting green courses.
 - » Consider a 9-hole course with a short-game “pitch and putt” course to appeal to new players/ visiting families while still shrinking the footprint of the course.
 - » The new dedicate greenspace should include dedicated paths and trails to better connect the community.

Leisure World Golf Course



The Villages Mickylee Pitch & Putt



Woodlands of Urbana Golf Simulator



The Villages Fenney Putt and Play Course



Source: Community Websites; RCLCO

INTERIOR AND EXTERIOR FACILITIES RECOMMENDATIONS: POOL AND DECK

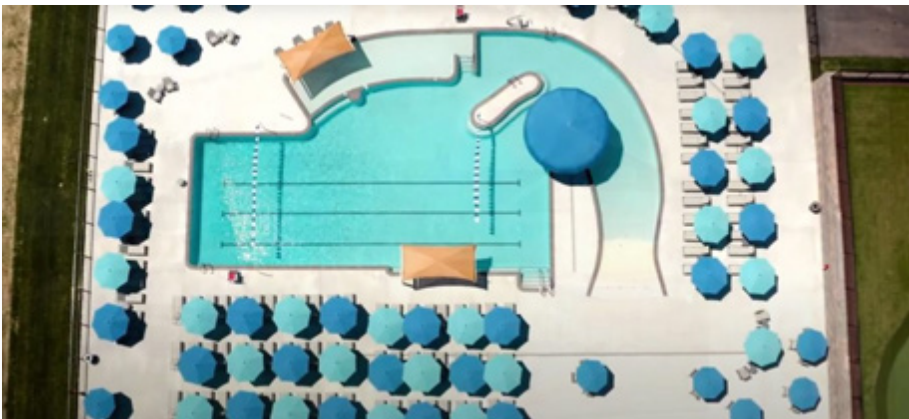
Pool

- Description: The pool at Clubhouse I is approaching the end of its usability
- Recommendation: Reconstruct the outdoor pool area.
 - » The outdoor pool and deck area could feature new design standards such as cabanas, fire pits, and seating areas. The pool can be more reflective of a resort-style pool with zero entry design and ADA entry given that there is an indoor lap pool, indoor social pool, and indoor hot tub.

Leisure World Outdoor Swimming Pool



Woodlands of Urbana Pool



Four Seasons at Kent Island Pool



Four Seasons at Kent Island Pool Area



Source: Community Websites; RCLCO

REVENUE ENHANCEMENT OPPORTUNITIES

Opportunities for significant revenue enhancement are likely to come primarily from new housing or efforts to bolster existing home values. While strategies for revenue enhancement opportunities are more limited outside of real estate considerations, there are cost mitigation options which could be considered.

- ▶ **New Housing:** Leisure World's average home price is currently the lowest among competitive active adult communities in the region. While this is partially due to the larger share of smaller, high-rise condominium units, the age and finish quality of existing homes is also a factor. New housing at Leisure World could help to revitalize the housing standards in the community, increasing its perception within the regional Active Adult market and helping to bolster overall home values. New housing units would introduce a new source of revenue for trust and mutual fees, in addition to revenue generated from capital contribution fees on the sale of these units.
- ▶ **Strategies to Improve Existing Home Values:** In addition to the delivery of new housing, there are also strategies which could help to improve existing home values, thus increasing future capital contribution fee revenues. Examples of these strategies include:
 - » *Incentivize Investment in Existing Homes:* At present, we understand that homes sold in Leisure World can be quite dated in terms of their features, finishes, and functionality. Incentivizing owners or investors to invest in upgrading their housing units could help to boost values and improve capital contribution fee revenue over the long-term. To attract investors, capital contribution fees could be eliminated for those intending to improve and re-sell new units within a designated time, with fees charged on the sale of the upgraded unit.
 - » *Rebranding Strategy:* In addition to directly upgrading existing units, home values could indirectly be improved by elevating the perception or existing reputation of the community. A rebranding effort, such as through a community name change, could help to alter the perception of Leisure World from that of a retirement community primarily targeting older households, to that of an "Active Adult Community" attracting a diversity of household types, including younger households above the age of 55.
- ▶ **Cost Mitigation:** Another consideration, in addition to the revenue enhancement opportunities above, would be the reduction of operating costs within the community. Examples of cost mitigation strategies could include:
 - » *Resizing Golf:* Reducing the current footprint of the underutilized golf course could allow for multiple revenue enhancement opportunities. Most of the repurposed land would remain as green space or additional amenity programming, which would further improve the attractiveness of the community and its perception within the regional active adult market. However, additional housing could also be considered on portions of the reconfigured land. In addition, a reconfigured and "resized" golf course oriented to the level of play it currently receives would significantly reduce the operating costs associated with maintaining a larger golf course.
 - » *Reducing Other Services:* The reduction of other services currently offered at Leisure World, potentially including but not limited to the shuttle service, could be considered as a strategy for reducing costs, and for changing the perception of Leisure World as a retirement community primarily targeting older households, to that of an "Active Adult Community" attracting a diversity of household types, including younger households above the age of 55.

OPPORTUNITIES FOR NEW HOUSING AT LEISURE WORLD

There are limited opportunities for new housing, though some sites bear further exploration and are currently underutilized

There are currently several sites that could be suitable for new housing development with some reconfiguration of existing parking, residential, and amenities, including:

- ▶ **Site A – Clubhouse I Parking Lot:** The parking lot outside of Clubhouse I is approximately 2.25 acres and could potentially be converted to additional residential. The site could fit approximately fit a 10- and 5-story building if vehicular access to Clubhouse I is kept the same, but additional density could be found by reconfiguring access to future parking and admin building. Parking would only be temporarily impacted during construction, and once completed parking needs at Clubhouse I would be return to normal operation.
- ▶ **Site B – Owning Individual Mutuals:** Mutual 7 is one of the smallest, cheapest priced, and oldest mutual in Leisure World. While gaining ownership of individual mutuals and properties will likely be costly and difficult as it requires individual owners to sell to Leisure World in the open market, it will allow new housing to be developed and release new units on the market at a much higher price point. Future development would likely be better located closer to the clubhouse, which would create additional open space at the intersection of Gleneagles Drive and S Leisure World Boulevard.
- ▶ **Site C – Golf Course:** A majority of the golf course should remain as green space if its footprint is shrunk, however, there may be a corner in the eastern part of the course that could be future residential. Site C represents the best development potential of the shrunken golf course footprint, a majority of which will still be reserved for greenspace. There are several development opportunities identified for this site including 5- and 10-story residential developments and could also be a site for additional recreational amenities such as a pickleball facility.
 - » A reconfigured golf course would create more useable open space for all residents to enjoy that are not limited around golf. This open space would create a benefit for the entire community and not just the subset who golf. Programming this new dedicated open space with walking paths, passive spaces, dog parks, children's playgrounds, exercise stations, outdoor performances and an amphitheater, additional pickleball, and an expanded outdoor pool will increase the value of the community overall.
- ▶ **Site D – Gardens, Maintenance, & Medical Center:** To create an opportunity for new housing the community gardens could be relocated to an expanded facility in new open space unlocked if the golf course footprint shrinks. Moving the medical center and maintenance buildings elsewhere (Site A) would fully unlock the development potential for this site.

OPPORTUNITIES FOR NEW HOUSING AT LEISURE WORLD



Source: Client

OPPORTUNITIES FOR NEW HOUSING AT LEISURE WORLD

Project	Clubhouse I Parking Lot	Acquire and Redevelop Oldest Mutual(s)	Reduce Number of Golf Holes	Gardens, Maintenance, & Medical Center
Description	The Clubhouse I parking lot is the largest undeveloped parcel in Leisure World. Additional residences could be constructed with structured parking underneath. Parking spaces would still be dedicated for the clubhouse.	Leisure World could acquire individual residences in a mutual and redevelop residences to reflect current market demand.	Reducing the footprint of golf to match the annual rounds played would free up dedicated green space for all residents to enjoy. A small portion of this land could also accommodate new residences.	The gardens, physical properties building, and MedStar Health are currently underutilized. These uses could be transferred elsewhere in Leisure World unlocking new land for development
Economic Considerations	Revenues: Sales of Residences; Mutual and Trust Fees Costs: Development of Residences and Parking Structure	Revenues: Sales of Residences; Mutual and Trust Fees Costs: Acquisition of Individual Residences; Development of Residences	Revenues: Sales of Residences; Mutual and Trust Fees Costs: Development of Residences	Revenues: Sales of Residences; Mutual and Trust Fees Costs: Development of Residences; Relocation of Gardens, Maintenance, and Medical Center
Benefits	-New residences create a one-time revenue from the sale of revenue, and recurring revenue from mutual and trust fees. -New residences also may act as a marketing tool, allowing Leisure World to advertise its updated units to the broader market.	-New residences create a one-time revenue from the sale of revenue, and recurring revenue from mutual and trust fees. -New residences also may act as a marketing tool, allowing Leisure World to advertise its updated units to the broader market.	-New residences create a one-time revenue from the sale of revenue, and recurring revenue from mutual and trust fees. -New residences also may act as a marketing tool, allowing Leisure World to advertise its updated units to the broader market. -More dedicated greenspace benefits the entirety of Leisure World allowing residents 24/7 access to more trails and greenspace.	-New residences create a one-time revenue from the sale of revenue, and recurring revenue from mutual and trust fees. -New residences also may act as a marketing tool, allowing Leisure World to advertise its updated units to the broader market. -Gardens could be more easily accessible if relocated to a dedicated space on the existing golf course grounds.
Challenges	-Access to Clubhouse parking will be limited during construction	-Acquiring individual residences will likely be challenging and expensive with no guarantee all residences can be acquired. -Only four residences have sold on average per year. In 2023 Mutual 7 had an average selling price of \$162,200.	-Harsh opposition from golf course members.	-Members may be opposed to relocating gardens
Housing	New Housing Can Achieve an Average Price of \$555,750 (\$376 per square foot)			

Source: RCLCO

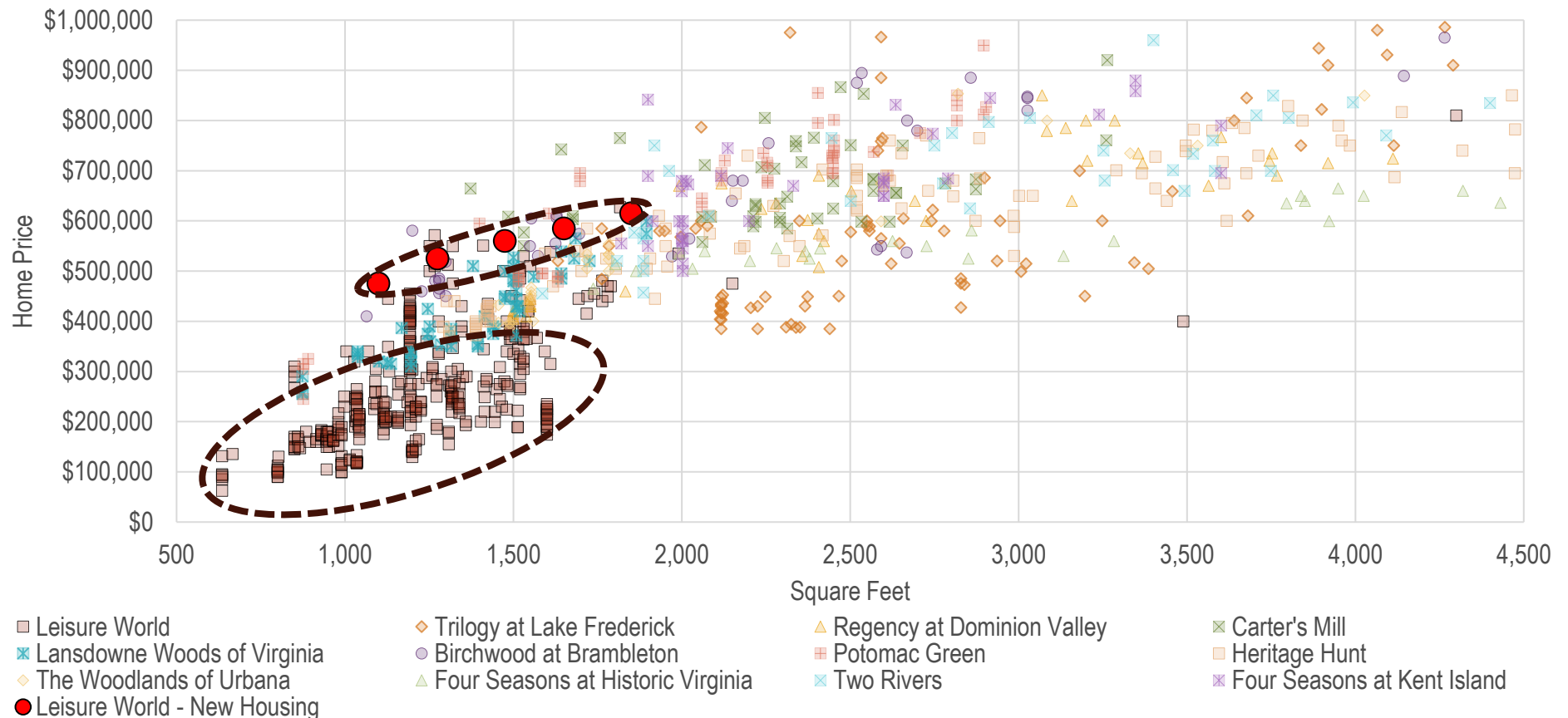
NEW HOUSING PRICING POTENTIAL

New residences at Leisure World can achieve higher prices and introduce new product at sizes that are seldom offered in the community's current offering.

Recommended New Housing Program

Floorplan	Bedroom	Bathroom	Den	Unit Mix	Avg. Size	Avg. Price	\$/SF
A1	1	1.5	X	10%	1,100	\$475,000	\$432
B1	2	2		25%	1,275	\$525,000	\$412
B2	2	2	X	25%	1,475	\$560,000	\$380
C1	3	2		30%	1,650	\$585,000	\$355
C2	3	2		10%	1,850	\$615,000	\$332
Weighted Avg.				100%	1,478	\$555,750	\$376

Price to Size Comparison, Leisure World and Competitive Set and Recommended New Residential Pricing; November 2022 – November 2023



Source: Redfin; RCLCO

Task 4: Rationale and Order of Magnitude Impact Estimates

***Original: September 12, 2024
Updated: January 22, 2025***

RATIONALE AND ORDER OF MAGNITUDE IMPACT NARRATIVE: EXPECTED IMPACT ON LEISURE WORLD

Each project was evaluated on several criteria related to competitiveness in the Active Adult Community market, impact on Leisure World's lifestyle offerings, magnitude of financial impact on Leisure World, and other key factors.

In order to provide guidance on the implementation of future projects at Leisure World, RCLCO developed a framework to rank each project relative to each other in terms of their expected impact to Leisure World, expected costs, and expected health benefits. The key projects evaluated include the following: Trails; Clubhouse I Renovations; Clubhouse I – Pool; Pickleball; Clubhouse II Auditorium; Bike Lanes; Playground; Dog Park; and Community Gardens. Detailed descriptions for each project are provided in the following pages of this report.

The Expected Impact on Leisure World is a relative ranking based on the expected impact of each amenity on the overall quality of lifestyle offering at Leisure World in regard to 1. Its ability to meet demands of current residents, 2. Its ability to attract new households 3. Its likely contribution to home valuations, and 4. Its competitiveness within the regional Active Adult market.

Expected Project Impact Sorted by Ranking, Leisure World; January 2025

Project	Expected Impact (1-9; Most to Least Impact)
Trails	1
Clubhouse I Renovations	2
Clubhouse I - Pool	3
Pickleball	4
Clubhouse II Auditorium	5
Bike Lanes	6
Playground	7
Dog Park	8
Community Gardens	9

Note: Impact is ranked 1-9 (1 is most impact, 9 is least impact)

Source: RCLCO

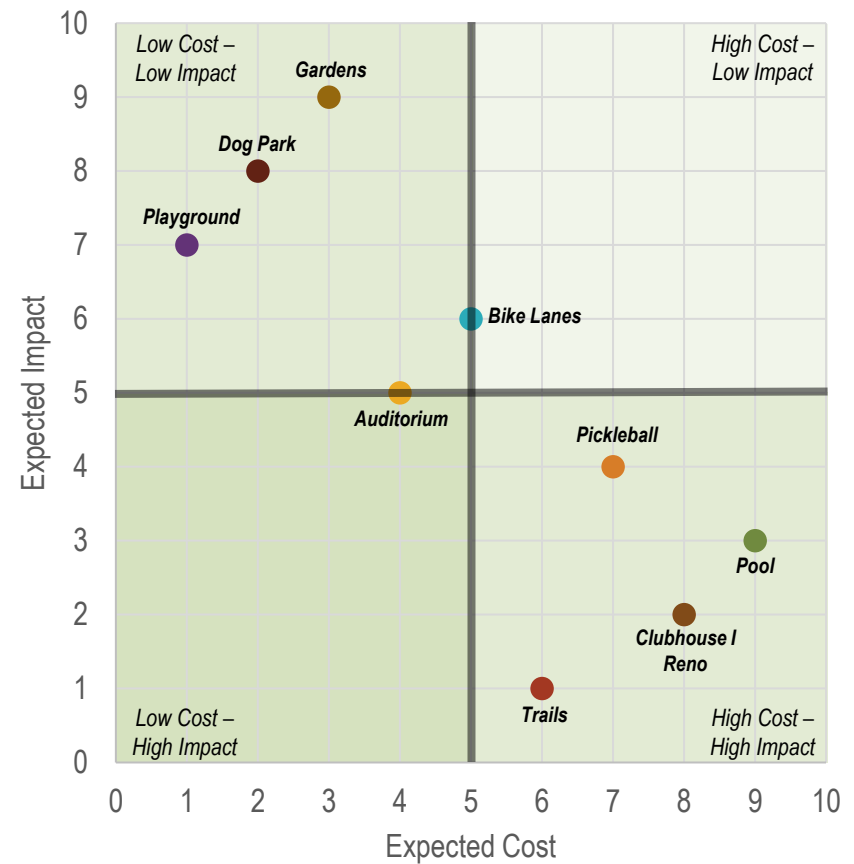
RATIONALE AND ORDER OF MAGNITUDE IMPACT NARRATIVE: EXPECTED IMPACT AND COST

In addition to the expected impact per project, RCLCO evaluated the potential prioritization of projects inclusive of their potential costs.

“Expected Cost” is based on an estimated order of magnitude cost impact for improvements. The “Prioritization Score” shown below is an average of the expected Impact and Expected Cost and is used as a means of ranking each project relative to each other’s relative return and costs.

Expected Impact and Cost Sorted by Prioritization Score, Leisure World; January 2025

Project	Expected Impact (1-9; Most to Least Impact)	Expected Cost (1-9; Low to High Cost)	Prioritization Score (Lower = Better)↓
Trails	1	6	3.5
Playground	7	1	4.0
Clubhouse II Auditorium	5	4	4.5
Clubhouse I Renovations	2	8	5.0
Dog Park	8	2	5.0
Pickleball	4	7	5.5
Bike Lanes	6	5	5.5
Clubhouse I - Pool	3	9	6.0
Community Gardens	9	3	6.0



Note: Score reflects average of Impact and Cost ranks. Impact is ranked 1-9 (1 is most Impact, 9 is least impact). Costs are ranked 1-9 (1 is least expensive, 9 is most expensive).

Source: RCLCO

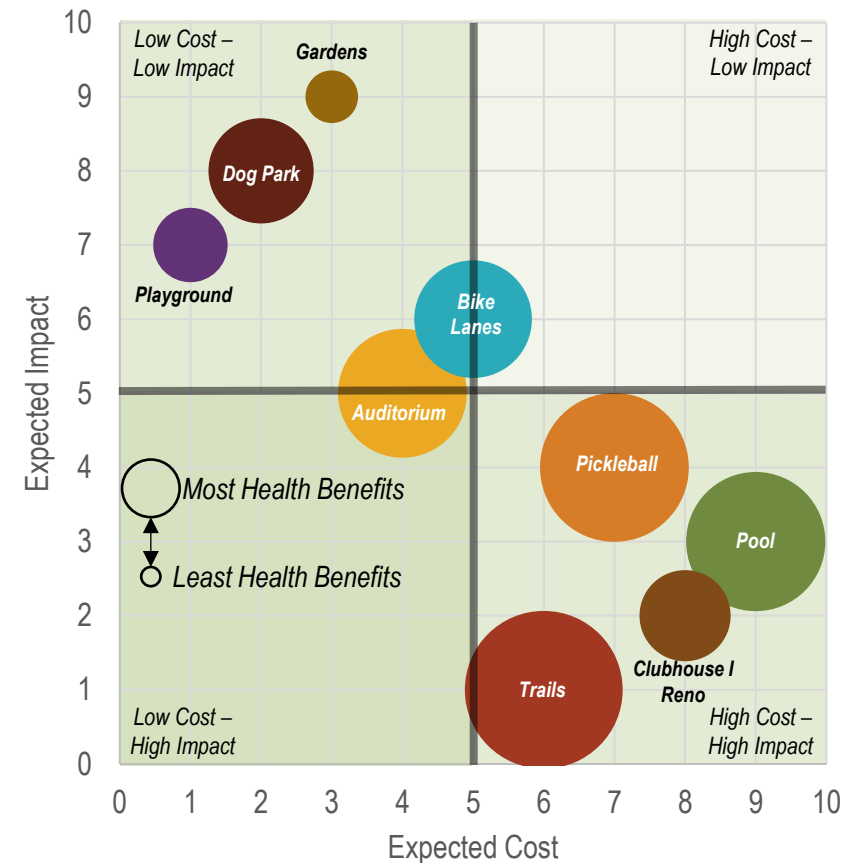
RATIONALE AND ORDER OF MAGNITUDE IMPACT NARRATIVE: OVERALL IMPACT, COST, AND HEALTH CONSIDERATIONS

In addition to Impact and Cost, RCLCO evaluated potential health benefits as a factor for prioritizing projects.

The expected Health Benefits were also factored into the prioritization framework accounting for the expected benefit to the overall health of residents in terms of resident's activity level and socialization. Using this factor along with the expected impact and cost, a final prioritization score was derived in order to rank the projects in relation to each other and provide guidance for the possible implementation of projects. Projects that may be better prioritized include an update to Leisure World's trail system, new pickleball courts, auditorium renovations, and clubhouse pool renovations. Bike lanes, playgrounds, dog parks, and community gardens achieved an average prioritization score indicating these projects would be beneficial but may not be as immediate a need for Leisure World.

Expected Impact, Cost, and Health Benefits Sorted by Prioritization Score, Leisure World; January 2025

Project	Expected Impact (1-9; Most to Least Impact)	Expected Cost (1-9; Low to High Cost)	Expected Health Benefit (1-9; Most to Least Benefits)	Prioritization Score (1-9; Lower = Better)↓
Trails	1	6	1	2.7
Pickleball	4	7	2	4.3
Clubhouse II Auditorium	5	4	4	4.3
Clubhouse I - Pool	3	9	3	5.0
Bike Lanes	6	5	5	5.3
Playground	7	1	8	5.3
Dog Park	8	2	6	5.3
Clubhouse I Renovations	2	8	7	5.7
Community Gardens	9	3	9	7.0



Note: Score reflects average of Impact, Cost, and Health ranks. Impact is ranked 1-9 (1 is most Impact, 9 is least Impact). Costs are ranked 1-9 (1 is least expensive, 9 is most expensive). Health Benefits are ranked 1-9 (1 is most beneficial, 9 is least beneficial).

Source: RCLCO

PROJECT RATIONALE: TRAILS

More walking trails and dedicated greenspace was the number one amenity desired in resident's surveys in Leisure World and is continually one of the highest rated amenities in national consumer surveys.

Description	More dedicated trails and open space to be established on the east portion of the existing golf course (preserving 9-holes for golf). This will include a ~1.6-mile loop along the existing cart path and connect to existing neighborhood paths.	
Expected Impact (1-9; Most to Least Impact)	1	This will immediately benefit the entire community upon completion which has repeatedly expressed interest in more trails.
Expected Cost (1-9; Low to High Cost)	6	Cart path may need to be updated or repaired in certain sections to accommodate more walkers. Will likely also need a contingency of budget for installing benches, fitness stations, trash cans, lights, etc.
Expected Health Benefit (1-9; Most to Least Benefits)	1	Walking trails will contribute to a healthier population by allowing residents to more easily access dedicated walking paths.
Prioritization Score (1-9; Lower = Better)	2.7	Relatively modest expected costs with high expected return make this project the most appealing.
Rationale	With a moderate expected cost basis and the highest expected return and benefit to residents' health, this project should be pursued. This will immediately benefit existing residents and further allow Leisure World to market its active lifestyle to prospective residents.	

Trails – Birchwood at Brambleton



Trails – Leisure World



Source: RCLCO

PROJECT RATIONALE:

PICKLEBALL

Leisure World should expand its current sports courts offerings to remain competitive in the active adult market. Its current four pickleball courts are not enough to effectively service residents, especially when compared to the ratio of courts to residents at competing AACs.

Description	A new pickleball complex with 8 new courts, 1 lighted championship court with 300+/- seats, a pavilion with restrooms, 39 parking spaces will expand Leisure World's total to 12 pickleball courts.	
Expected Impact (1-9; Most to Least Impact)	4	This will allow Leisure World to offer top-of-market pickleball facilities among competitors and attract more active demographics.
Expected Cost (1-9; Low to High Cost)	7	Costs for hard surface paving, court equipment, pavilion, restrooms, seating, etc.
Expected Health Benefit (1-9; Most to Least Benefits)	2	Additional courts will allow residents to be more active.
Prioritization Score (1-9; Lower = Better)	4.3	Above average return to the community and health benefits make this amenity highly rated, though costs are above average.
Rationale	This project will immediately benefit Leisure World's racquet sports players and allow it to market to a more active demographic and contribute to an overall more active and health community. Though costs are above average, this project should likely be a bigger priority than most other projects.	

Saddlebrook Ranch Pickleball Club, Oracle, AZ



Leisure World – New Pickleball Complex Envisioning



Source: RCLCO

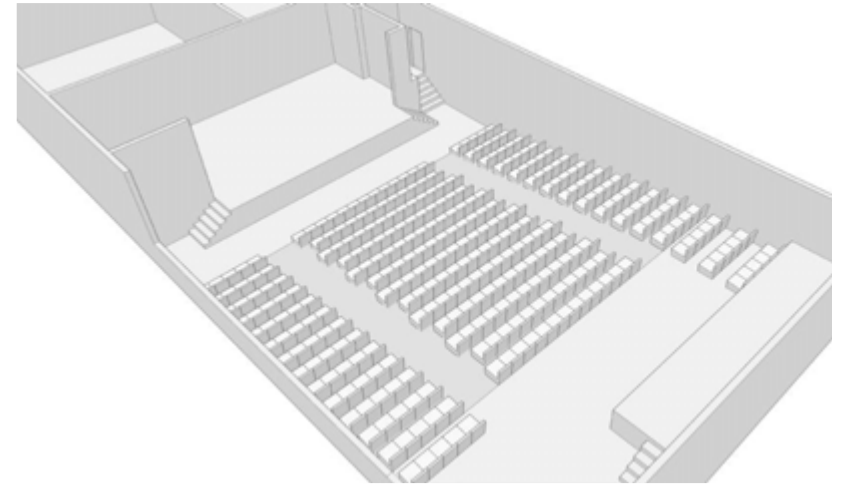
PROJECT RATIONALE:

CLUBHOUSE II AUDITORIUM

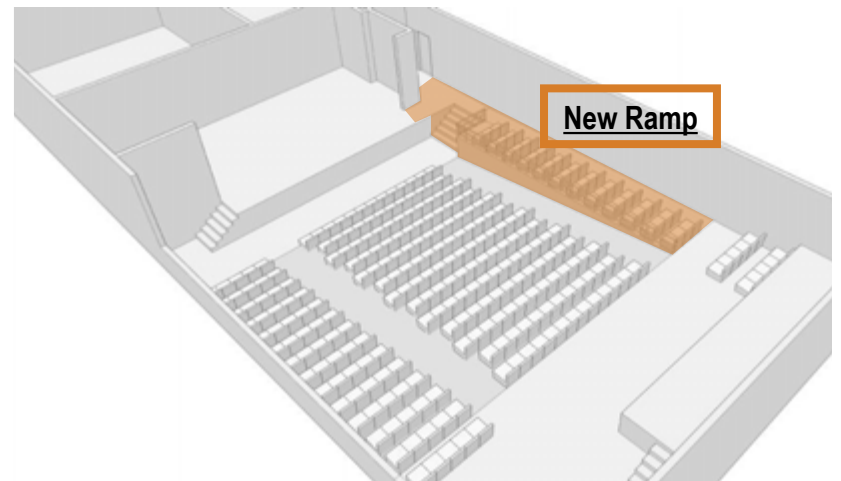
Auditorium renovations could bring the auditorium up to code with wheelchair seating and an accessible route to the stage and improve the overall resident experience by updating the audiovisual systems and auditorium's finishes (paint, carpet, etc.).

Description	Renovate the Auditorium to bring it up to code, increase wheelchair seating, create an accessible route to the stage, improve the audiovisual systems, and update the auditorium's finishes.	
Expected Impact (1-9; Most to Least Impact)	5	Updates could provide a needed lift to the auditorium allowing for a better experience.
Expected Cost (1-9; Low to High Cost)	4	Cost is expected to be average for renovations.
Expected Health Benefit (1-9; Most to Least Benefits)	4	Auditorium renovations will have an average impact on the community's overall health, providing a better experience for one of the residents' main gathering space.
Prioritization Score (1-9; Lower = Better)	4.3	A relatively moderate cost, impact, and health benefit make auditorium updates a relatively favorable project to pursue.
Rationale	These updates could provide new life and usability to this amenity, which serves as a major gathering spot for residents. Additionally, the auditorium has the potential to produce revenue for the community, though would likely need more costly renovations (green rooms, audio/visual, etc.) to attract ticketed events.	

Leisure World – Existing Auditorium



Leisure World – Auditorium Updates



Source: RCLCO

PROJECT RATIONALE:

CLUBHOUSE I – POOL DECK AND LANAI

The current pool needs a major redesign and expansion to accommodate more concurrent users and allow for a modern design including amenities such as zero-entry and an expanded deck.

Description	Extended lanai to increase pool deck size with more prominent pavilions to emphasize ends, and build a new ADA compliant ramp to connect to Clubhouse I.	
Expected Impact (1-9; Most to Least Impact)	3	This will provide an elevated experience at Leisure World's outdoor pool, and this will also allow Leisure World to accommodate more residents at one time with an expanded pool deck.
Expected Cost (1-9; Low to High Cost)	9	Cost is expected to be relatively high due to the major redesign needed of the pool deck and to meet ADA compliance.
Expected Health Benefit (1-9; Most to Least Benefits)	3	The pool serves as a way for residents to both exercise and socialize for several months of the year, providing a positive benefit to the community.
Prioritization Score (1-9; Lower = Better)	5.0	A high expected return on investment for the community but relatively high costs give this amenity achieve just an average score. Priority may be further influenced by the life stage of the pool itself.
Rationale	This project is needed as the pool is reaching the end of its viability. The high cost is likely worth a complete redesign as renovations pool will also be expensive and may not considerably prolong the pool's usability.	

Four Seasons at Kent Island Pool



Leisure World Outdoor Swimming Pool



Source: RCLCO

PROJECT RATIONALE:

BIKE LANES

Adding bike lanes to Leisure World would enhance its livability and active lifestyle benefitting both future and current residents.

Description	Add bike lanes to Leisure World connecting the roads, including Leisure World Boulevard, to the community's walking paths.	
Expected Impact (1-9; Most to Least Impact)	6	The impact is expected to be relatively lower compared to other projects as this will impact only the portion of residents who bike.
Expected Cost (1-9; Low to High Cost)	5	Cost is expected to be average due to the planning work and hard costs of lines, protections, and other safety necessities needed.
Expected Health Benefit (1-9; Most to Least Benefits)	5	This will have an impact on residents' health by allowing more accessible and safe exercise options for residents.
Prioritization Score (1-9; Lower = Better)	5.3	Bike lanes will have a measurable impact on the community's overall health supported by an average cost basis, though the overall value to the community may be lower than other projects.
Rationale	Bike lanes will improve Leisure World's livability and active lifestyle offered to residents and prospective residents. This will also improve safety for bikers as there are no dedicated bike lanes along Leisure World's roads.	

Bike Lane – The Villages, FL



Leisure World – No Dedicated Bike Lanes



Source: RCLCO

PROJECT RATIONALE: PLAYGROUND

A dedicated playground for visiting grandchildren within Leisure World's gates will improve the overall quality for residents by allowing family visits to stay within the community for recreational activities and will also make Leisure World competitive with other AACs that offer playgrounds.

Description	A playground area for visiting grandchildren along the trail network.	
Expected Impact (1-9; Most to Least Impact)	7	The overall value of a new playground area is lower compared to other amenities, but this will serve as the only dedicated facility for visiting grandchildren inside Leisure World's gates.
Expected Cost (1-9; Low to High Cost)	1	Low expected cost as only hard costs are playground equipment and benches, trash cans, etc.
Expected Health Benefit (1-9; Most to Least Benefits)	8	A playground will be beneficial for visiting families but will have little direct impact on residents' overall health.
Prioritization Score (1-9; Lower = Better)	5.3	A low-cost amenity that will provide marginal benefit to the community.
Rationale	This project will provide immediate benefit to residents with visiting families at a relatively low cost. Additionally, this may encourage families to visit more frequently improving the quality of life for residents. This will also be the only dedicated amenity for visiting grandchildren, an amenity that several competitors offer.	

Callalily Park – Brambleton, VA



Woolsey Park – Brambleton, VA



Source: RCLCO

PROJECT RATIONALE:

DOG PARK

Having a dedicated dog park with pet waste stations, benches, water fountains, and sections for small and large breeds will better serve residents who own dogs, and market a more active lifestyle for potential residents.

Description	A three-acre dog park with two separate fenced play areas for small and large breeds complete with drinking fountains, pet waste areas, and 12 parking spaces.	
Expected Impact (1-9; Most to Least Impact)	8	This will be a highly beneficial for dog owners in Leisure World, though dog owners only make up a portion of residents at Leisure World
Expected Cost (1-9; Low to High Cost)	2	Relatively low costs as only hard costs are fencing/gating, drinking stations, benches, etc..
Expected Health Benefit (1-9; Most to Least Benefits)	6	This will allow residents to be more active and more social, though will only benefit a subset of the community.
Prioritization Score (1-9; Lower = Better)	5.3	Relatively low cost and land needed make this project attractive despite a below average return on value to the community overall. Highly valuable to the subset of owners that will use this amenity though does not benefit every resident.
Rationale	This project has a low expected cost and minimal impact on just three acres with an average expected return and health benefits scoring this amenity favorably.	

Dog Park – Starkey Ranch Master-Planned Community, FL



Dog Park – Leisure World Envisioning



Source: RCLCO

PROJECT RATIONALE:

CLUBHOUSE I – RENOVATIONS

As one of the main gathering spot for the community, Clubhouse I needs several renovations to present a more modern and up-to-date welcome point for guests and potential residents and to better serve the needs of current residents.

Description	Renovations and updates to Clubhouse I including a new covered pickup/drop-off and entryway, two new rooms to the front façade enhancing the main entrance and removing an existing room to connect visually to the pool.	
Expected Impact (1-9; Most to Least Impact)	2	This will impact the desirability of Leisure World by providing a modern and updated main gathering space for its residents and will provide a better first impression for visitors and prospective residents.
Expected Cost (1-9; Low to High Cost)	8	Cost is expected to be relatively high due to the additions and renovations outlined.
Expected Health Benefit (1-9; Most to Least Benefits)	7	Additional space and accessibility to the clubhouse will encourage residents to be more social but will have little direct impact on residents' health beyond that.
Prioritization Score (1-9; Lower = Better)	5.7	A high expected return on investment for the community but relatively high costs score this amenity as average. While this will provide exceptional value to the community it will also likely require significant funding.
Rationale	This project is much needed despite its likely higher than average cost as this will breathe new life into the main gathering spot for Leisure World's residents and allow it to advertise it's new and modern amenities to prospective residents.	

Four Seasons at Kent Island Clubhouse



Leisure World Clubhouse I



Source: RCLCO

PROJECT RATIONALE: COMMUNITY GARDENS

The community gardens could be relocated along the new trail system and free up land more potentially higher and better land uses such as new housing which could provide a new revenue source for Leisure World.

Description	Relocate the community gardens from the existing plots to a new section near the Magnolia Park. Increase number of plots from 262 from 260, include 33 dedicated parking spaces and storage buildings.	
Expected Impact (1-9; Most to Least Impact)	9	This is expected to provide the lowest value for Leisure World's residents.
Expected Cost (1-9; Low to High Cost)	3	Cost is expected to be relatively low as only hard costs are the surface parking, storage areas, and garden plots.
Expected Health Benefit (1-9; Most to Least Benefits)	9	Gardens will allow participating residents to eat healthier with fresh ingredients and encourage a more active lifestyle through gardening.
Prioritization Score (1-9; Lower = Better)	7.0	While this is a low-cost amenity, the overall value of the gardens to the community is low, but the current land could accommodate higher and better land uses such as new residential housing that can generate more revenue for Leisure World.
Rationale	The current gardens could be reutilized for other projects such as new housing. The resizing of nine holes of the golf course could allow the gardens to move locations, freeing up this land and potentially generating more revenue with new housing on the current garden land.	

Leisure World – Current Gardens



Leisure World – Gardens Envisioning



Source: RCLCO

Task 5: Implementation Schedule and Phasing Strategies

January 22, 2025

CONSIDERATIONS FOR GOLF COURSE SIZING

There is an opportunity to resize a portion of the golf course at Leisure World to meet the needs of the community overall by providing trails and open space while still serving current and future residents who golf.

- ▶ Residents cited trails and open space as the most desirable amenity, and many residents currently use the golf course's cart paths as a walking path before/after the golf course's operating hours.
- ▶ New dedicated open space could convert some existing cart paths into the community's trails. Furthermore, this space could allow for the development of additional amenities discussed in the following report, including dog parks, new garden plots, and pickleball courts.
- ▶ The current 18-hole golf course at Leisure World does not generate positive cash flow, and a golf course with fewer holes could likely accommodate demand from residents at Leisure World in terms of necessary rounds of play while subsequently shrinking the current annual deficit being generated. This could allow Leisure World to offer more dedicated open space to all residents while still meeting the needs of the community's golfers.
- ▶ A creative golf course re-design as part of the re-purposing could allow for the same golf experience from a typical 18-hole course, as seen in examples such as:
 - » Ocala Preserve (Ocala, FL): A unique 6-hole golf course with a 50-acre footprint that can be played in multiple configurations to mimic an 18-hole experience
 - » The Cradle (Pinehurst, NC): A 9-hole, par-3 course spanning just 789 yards
 - » Cloud Nine at Angel Park (Las Vegas, NV): A lighted 12-hole course inspired by famous golf holes worldwide

Leisure World – Open Space Envisioning



Source: RCLCO

CONSIDERATIONS FOR GOLF COURSE SIZING: *THE CASE FOR OPEN SPACE*

Golf re-sizing could open acres of land for all residents to enjoy as green space at any given time. As the open space will be kept as part of the envisioned amenity programming, real estate values are unlikely to be impacted.

“The addition of open-space elements that encourage a healthy lifestyle creates a compelling story that differentiates a development and provides a competitive advantage.” –The Case for Open Space, ULI

- Real estate values, particularly for homes that are located along the golf course today, are not expected to be impacted by resizing. Research into the impact of open space has found it capable of contributing to higher property values in the same way that golf frontage can contribute to property values. By preserving the open space of the back nine, and adding additional amenities, home values are unlikely to experience a negative impact.
- Golf course resizing would not reduce the green space in Leisure World but would redistribute the usability of that green space, giving all residents equal access to a dedicated natural areas with walking trails.

Leisure World – Open Space Envisioning



Source: RCLCO

GOLF DESIGN EXAMPLE: Ocala PRESERVE

MAXIMIZING GOLF WITH A SMALLER FOOTPRINT

Ocala Preserve is a unique 6-hole golf course spanning a 50-acre footprint which could be played in three configurations, allowing for maximum usability with minimal impacts on the need for space.

Skills Course

- ▶ 18-Hole, Par-54 Short Course
- ▶ Holes vary in length from 63 to more than 200 yards and can be completed in under 3 hours.

Players Course

- ▶ 18-Hole, Par-72 Course
- ▶ By looping the Skills Course twice more, and selecting from several tee box configurations, the players course offers a par 72 round of golf that is USGA handicap approved.

Gallery Loop

- ▶ 6-Hole, Par-18 Short Course
- ▶ A Par-3 experience that can be played in under an hour.

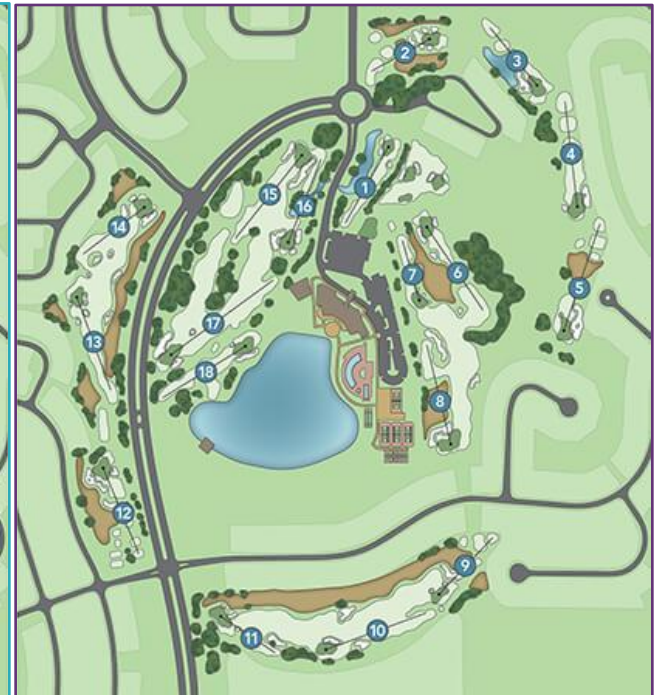
Skills Course



Players Course



Gallery Loop



Source: RCLCO

IMPORTANCE OF PHASING

Phasing is necessary as several projects are capital intensive (clubhouse, pool, auditorium) and several projects (trails, pickleball) cannot be implemented until the golf course is repurposed.

What projects can be done before golf course resizing?

- Pool; Bike Lanes; Clubhouse; Auditorium
 - » Pool, bike lanes, and clubhouse could be prioritized as capital allows.
 - » Pool and clubhouse are likely to be the most capital-intensive projects.

What projects can be done in the future (after golf course resizing)?

- Trails; Pickleball; Playground; Dog Park; Community Gardens
 - » Trails, pickleball, playground, and dog park could be accomplished after land is unlocked through golf course resizing.
 - » Trails are likely the most important project to prioritize based on RCLCO's research into their importance to communities and housing consumers. To satisfy community needs before golf course resizing, additional trails could be built around the perimeter of Leisure World using agreements with individual mutuals. After golf course resizing, a network of trails could be established through the open space that is unlocked.

What about golf course resizing?

- Leisure World's golf operations are losing money, with an operating loss of approximately \$500,000 per year.
- With projected capital expenditures, net cash flow will be over \$1,000,000 in deficit annually.
- Nationally there is an oversupply of golf courses. The best growth opportunities in golf are for "off-course" experiences – putting courses, driving ranges, par-3/executive courses, etc..
- There is an opportunity to deliver additional important amenities at Leisure World to enhance its competitiveness, while still providing enough golf for current and future users.

Expected Cost, Impact, and Health Benefits Sorted by Prioritization Score, Leisure World; January 2025

Project	Expected Impact (1-9; Most to Least Impact)	Expected Cost (1-9; Low to High Cost)	Expected Health Benefit (1-9; Most to Least Benefits)	Prioritization Score (1-9; Lower = Better)↓
Trails	1	6	1	2.7
Pickleball	4	7	2	4.3
Clubhouse II Auditorium	5	4	4	4.3
Clubhouse I - Pool	3	9	3	5.0
Bike Lanes	6	5	5	5.3
Playground	7	1	8	5.3
Dog Park	8	2	6	5.3
Clubhouse I Renovations	2	8	7	5.7
Community Gardens	9	3	9	7.0

Note: Score reflects average of Impact, Cost, and Health ranks. Impact is ranked 1-9 (1 is most impact, 9 is least impact). Costs are ranked 1-9 (1 is least expensive, 9 is most expensive). Health Benefits are ranked 1-9 (1 is most beneficial, 9 is least beneficial).

Source: RCLCO

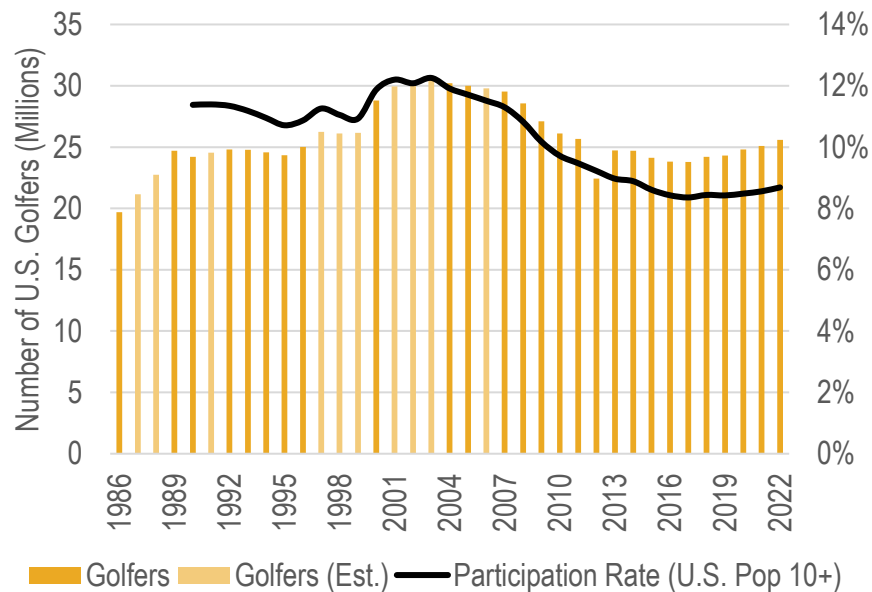
NATIONAL GOLF TRENDS

Leisure World 18-hole golf course may not need to be the future for Leisure World's golf as "off-course" participation in putting courses, driving ranges, and par-3/executive courses is growing swiftly.

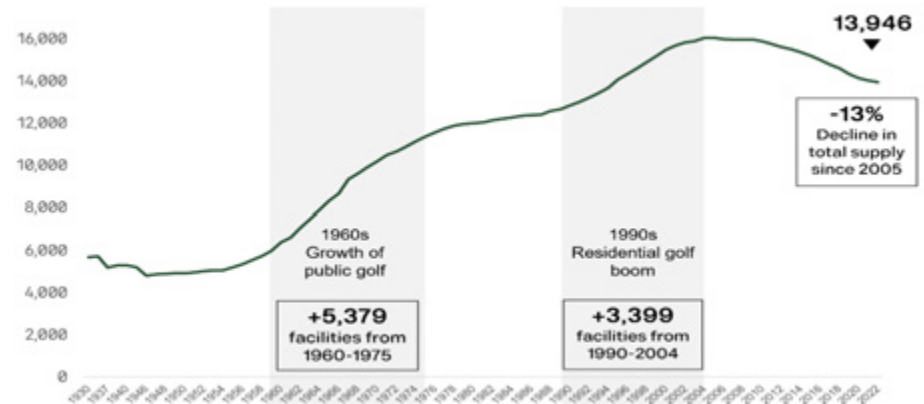
National Golf Trends:

- ▶ Golf participation in the U.S. has slowly rebounded after the Great Recession, with 26.6 million on-course golfers in 2023.
 - » Golf participation is still well below highs nationally seen in the late 1990s and 2000s.
- ▶ The U.S. has an oversupply of golf courses, specifically 18-hole championship courses.
- ▶ Growth in golf has been particularly strong for "off-course" participants – driving ranges, putting courses, par-3 and executive courses are all growing.

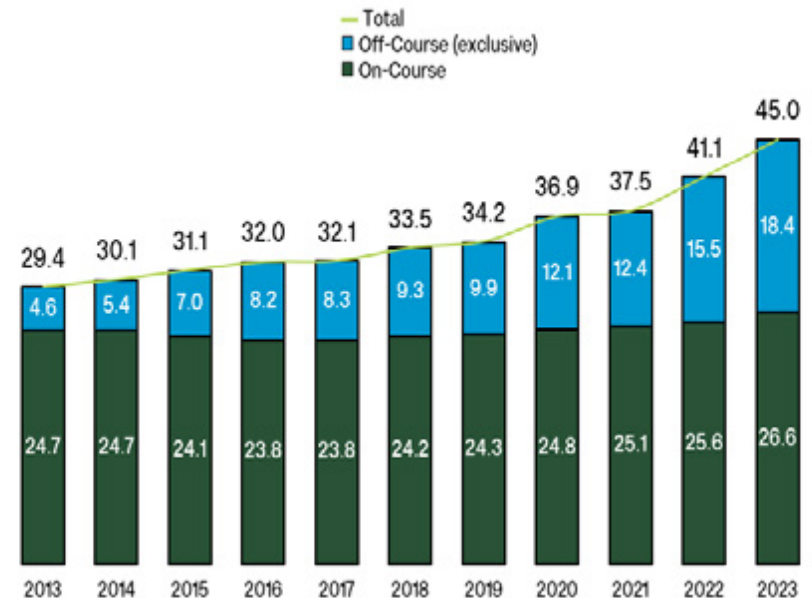
U.S. On-Course Golf Participation; 1985 – 2022



Changes in U.S. Golf Facility Supply; Since 1930



U.S. Golf Participation by On/Off-Course; 2013-2023

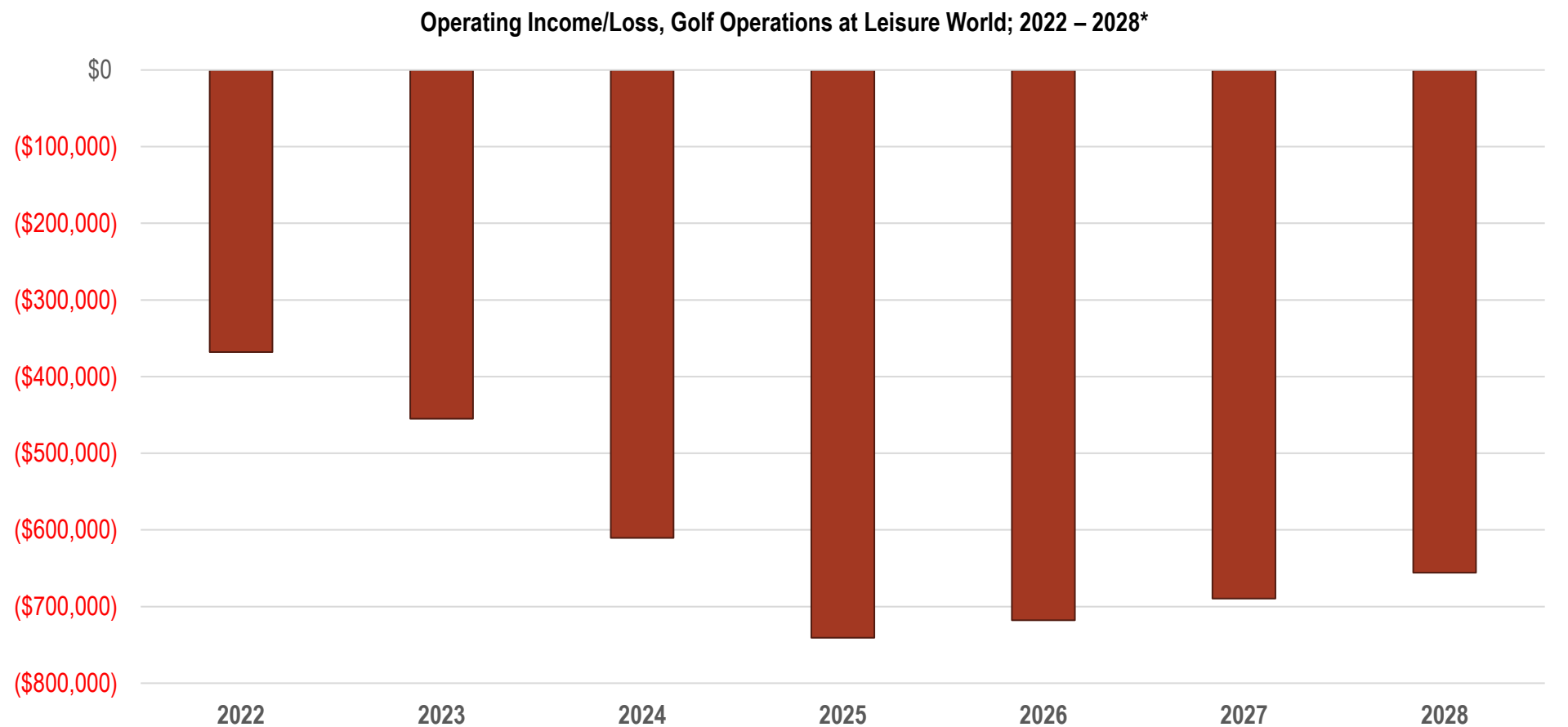


Source: National Golf Foundation's Golf Participation in the U.S. 2023 and Graffis Report 2023

LEISURE WORLD GOLF ECONOMICS

Golf operations at Leisure World are not financially sustainable.

- ▶ Operating losses over \$500,000 annually are projected through 2028.
- ▶ With planned capital expenditures, golf at Leisure World will generate on average a negative cash flow over \$1 million annually over the next four years.
- ▶ By transitioning a portion of the golf course to open space, Leisure World will significantly reduce the expenses associated with the golf course. The cost of maintaining open space is typically less than the costs of operating a golf course, in many cases significantly, due to less intense irrigation and landscaping costs.



*2022 – 2023 are historical figures.
2024 includes actuals for the first seven months of the year, and projections for the last five months.
2025 is a budgeted figure.
2026 – 2028 are based on growth factors of 10% for revenues, and 3% for expenses.

RATIONALE/IMPLEMENTATION OF PROJECTS BEFORE GOLF COURSE RESIZING

The golf course takes up significant land and several future projects have been identified for location on existing golf property. Before this is done, there may be projects to target for immediate consideration.

Pool: This project is needed as the pool is reaching the end of its viability. The high cost is likely worth a complete redesign as pool renovations are costly and may not considerably prolong the pool's usability. This project will provide a high return on investment and has positive impacts on resident health and lifestyle, despite the high costs. The impact on the golf course will be minimal, if any, as the pool overlooks the 18th green. This project could likely be done in tandem with the Clubhouse renovations.

Bike Lanes: Bike lanes will improve Leisure World's livability and active lifestyle offered to current and future residents. This will also improve safety for bikers given the current lack of dedicated bike lanes along Leisure World's roads. This project can be pursued immediately, and with a moderate cost expected can likely be undertaken alongside other projects.

Clubhouse: This project is much needed despite its higher-than-average cost, given the importance of the Clubhouse as the heart of the community, and the primary gathering location for existing residents, and the "front door" that welcomes new residents.

Auditorium: As one of the main gathering spots for residents, the auditorium is in need of renovations to bring it up to code and to improve the resident's overall experience. The auditorium needs to be brought up to code including providing an accessible route to the stage and provide more wheelchair seating closer to the stage. Additional renovations should likely be considered to improve the overall experience at the auditorium through improved audiovisual systems and updated finishes (paint, carpet, etc.). Backstage, minor improvements to the greenroom should be made, especially if Leisure World desires to use the Auditorium to attract major ticketed events.

Expected Cost, Impact, and Health Benefits Sorted by Prioritization Score, Leisure World; January 2025

Project	Expected Impact (1-9; Most to Least Impact)	Expected Cost (1-9; Low to High Cost)	Expected Health Benefit (1-9; Most to Least Benefits)	Prioritization Score (1-9; Lower = Better)↓
Trails	1	6	1	2.7
Pickleball	4	7	2	4.3
Clubhouse II Auditorium	5	4	4	4.3
Clubhouse I - Pool	3	9	3	5.0
Bike Lanes	6	5	5	5.3
Playground	7	1	8	5.3
Dog Park	8	2	6	5.3
Clubhouse I Renovations	2	8	7	5.7
Community Gardens	9	3	9	7.0

Note: Score reflects average of Impact, Cost, and Health ranks. Impact is ranked 1-9 (1 is most impact, 9 is least impact). Costs are ranked 1-9 (1 is least expensive, 9 is most expensive). Health Benefits are ranked 1-9 (1 is most beneficial, 9 is least beneficial).

Source: RCLCO

RATIONALE/IMPLEMENTATION OF PROJECTS AFTER GOLF COURSE RESIZING

After golf course resizing, land is unlocked for additional projects which are likely to have an outsized impact on the competitiveness and attractiveness of the lifestyle offered at Leisure World.

Trails: With a moderate expected cost and the highest expected return and benefit to residents' health, this project should be prioritized. This will immediately benefit existing residents and further allow Leisure World to market its active lifestyle to prospective residents. Once the golf course is repurposed, trails could become an immediate priority in the new unlocked open space through the creation of a new and updated network of trails. Given the importance of trails to residents, the current network of trails could be expanded even before golf course resizing, using land around the perimeter of Leisure World through agreements with individual mutuals.

Pickleball: This project will immediately benefit Leisure World's racquet sports players allowing it to market itself to a more active demographic and become a healthier and more active community overall. Though costs are above average, this project should likely be a bigger priority than most other projects and should be pursued as capital allows.

Playground: This project would provide immediate benefits to residents with visiting families at a relatively low cost. This would also be the only dedicated amenity for visiting grandchildren, which is an amenity that several competitors offer. Given the low cost associated with developing this project, it should be pursued immediately when land allocation allows.

Dog Park: This project has a low expected cost and minimal impact on just three acres with an average expected return and health benefits scoring this amenity favorably. Given the low cost associated with developing this amenity, it should be pursued as soon as possible when land allocation allows.

Community Gardens: The current gardens could be reutilized for other projects such as new housing. The resizing of nine holes of the golf course could allow the gardens to move locations, freeing up this land and potentially generating more revenue with new housing on the current garden land.

Expected Cost, Impact, and Health Benefits Sorted by Prioritization Score, Leisure World; January 2025

Project	Expected Impact (1-9; Most to Least Impact)	Expected Cost (1-9; Low to High Cost)	Expected Health Benefit (1-9; Most to Least Benefits)	Prioritization Score (1-9; Lower = Better)↓
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Source: RCLCO

POTENTIAL PHASING STRATEGY

The potential phasing strategy below emphasizes near term projects that will have an immediate impact on Leisure World's residents and their lifestyle, as well as contribute to the competitiveness of the community, followed by projects that become possible after the golf course can be repurposed.

- Projects for immediate consideration: Trails (Perimeter Trails); Golf Resizing; Clubhouse I – Pool and Renovations; Clubhouse II Auditorium
- Projects for mid-term considerations: Trails (Open Space Trail Network), Pickleball, Playground, and Dog Park are feasible after golf course resizing
- Project for long-term considerations: Bike Lanes, Community Gardens

Potential Phasing Strategy

Project	Near-Term	Mid-Term	Long-Term	Rationale
Trails	X (Perimeter Trails)	X (Open Space Network)		High benefit to Leisure World, should be started as soon as possible
Clubhouse I - Pool	X			High benefits to Leisure World likely make the high costs worth undertaking project, if capital allows
Clubhouse I - Renovations	X			High benefits to Leisure World likely make the high costs worth undertaking project, if capital allows
Clubhouse II Auditorium	X			Moderate cost and impact for one of Leisure World's main gathering spots
Pickleball	Golf Resize	X		High benefit to Leisure World, should be started as soon as possible
Playground	Golf Resize	X		Low-cost project, can likely be started once land is available
Dog Park	Golf Resize	X		Low-cost project, can likely be started once land is available
Community Gardens	Golf Resize		X	Low cost but low return, not a high priority
Bike Lanes			X	Moderate cost and impact, funds likely better used elsewhere in earlier years

Source: RCLCO

FINANCING STRATEGIES

Revenue Enhancement

Incentivize Investment in Existing Homes: At present, RCLCO understands that homes sold in Leisure World can be quite dated in terms of their features, finishes, and functionality. Incentivizing owners or investors to upgrade their housing units could help to boost values and improve capital contribution fee revenue over the long-term. To attract investors, capital contribution fees could be eliminated for those intending to improve and re-sell renovated units within a designated time, with fees charged on the sale of the upgraded unit.

Increasing Trust Fees: Leisure World is the most affordable community in terms of total expenses to owners. Fees would need to increase by 2.3x to reach the median ownership costs of the competitive set over a 10-year horizon, or home values would need to increase by 2.4x. While mutual fees are high in Leisure World, the overall trust fee is modest in comparison to its competitive set of active adult competitors, especially in relation to the amenities and services offered. Increasing the community's trust fee could result in more revenue while remaining competitive among similar communities.

Additional Housing: Leisure World's average home price is the lowest among competitive active adult communities (AACs) in the region. While this is partially due to the larger share of smaller, high-rise condominium units, the age and finish quality of existing homes is also a factor. New housing at Leisure World could help to revitalize housing standards in the community, boosting its perception within the regional AAC market and helping to bolster overall home values. New housing units would introduce a new source of revenue for trust and mutual fees, in addition to revenue generated from capital contribution fees on the sale of these units.

Cost Reduction

Golf Course Resizing: Reducing the current footprint of the underutilized golf course could allow for multiple revenue enhancement opportunities. Most of the repurposed land would remain as green space or additional amenity programming, which would further improve the attractiveness of the community and its perception within the regional active adult market. However, additional housing could also be considered on a small portion of the reconfigured land. In addition, a reconfigured and repurposed golf course oriented to the level of play it currently receives would significantly reduce the operating costs associated with maintaining a larger golf course.

► **Increase Golf Course Revenue:** If the golf course footprint is not reduced, Leisure World should consider exploring ways to increase revenue from golf operations – raising green fees, cart fees, opening additional play to public.

Revisit Cost Structure of Other Services: Leisure World, in comparison to other Active Adult Communities in the region, offers a significantly more comprehensive suite of services included within the community's fee structure. These services include, but are not limited to, shuttle services for residents, social work services. These types of services are typically more prevalent within Continuing Care Retirement Communities (CCRCs) which typically attract a much older segment of the market. By comparison, Active Adult Communities typically market to younger households that are above the age of 55. To the extent that additional funding or cost reduction is needed in order to ensure that Leisure World can accomplish the projects necessary to remain competitive as an Active Adult community, it may be prudent to consider adjustments to the cost structure of services being offered by the community. This could include a reduction in the services being offered or could shift the funding of such services toward those that wish to utilize them, rather than being offered for use by all residents through community fees.