

Pilgrim Place Application for Residency Information

Pilgrim Place is a vibrant residential senior community in Claremont, California. Founded in 1915, Pilgrim Place originally served as “home” for Christian missionaries on furlough and, later, other Christian workers. The mission of Pilgrim Place has expanded to provide quality housing and services for persons who have served in careers in religious, charitable, and non-profit humanitarian organizations. Pilgrim Place welcomes applications for residency from people who wish to reside in a culturally diverse, theologically/intellectually stimulating, ecologically sensitive, personally enriching, and communally active environment, and who fulfill the eligibility requirements as described below.

ELIGIBILITY

Persons may apply after completing 10 years in full-time (or the equivalent) employment in religious, charitable, or non-profit humanitarian organizations. Examples include commissioned or ordained missionaries, ministers, theological seminary faculty, college professors of religion, denominational executives, YMCA/YWCA staff, community organizers, and peace and justice workers. Applicants submit a personal statement describing the purpose/mission of each of the religious, charitable, or non-profit humanitarian organizations in which they have been employed, and how their role within these organizations helped to fulfill the organizations’ purposes. Continuing the historic precedent established by Pilgrim Place and actualized in the lives of its residents, applicants whose work provided visionary leadership in aiding and assisting others, improving social conditions, increasing spiritual and religious engagement, and benefiting the community and world will be given preference. Before moving to Pilgrim Place, the applicant must have completed at least 15 years of full-time employment. Spouses/partners of applicants who meet this qualification are also eligible to apply for admission. A spouse/partner, even if now widowed or divorced, who shared a 15-year marriage/commitment during the service years of a qualified person, is also eligible to apply. Primary Applicants are required to move to Pilgrim Place between their 62nd and 78th birthdays. Pilgrim Place is open to all such qualified persons regardless of gender, religion, race, ethnicity, national origin, disability, marital status, or sexual orientation.

APPLICATION PROCESS

Qualified individuals wishing to reside at Pilgrim Place must submit an application, including an Application Form, resume, personal statement, and \$250 application fee (per person). At least six references are required for each applicant, two being residents of Pilgrim Place, if possible. Pilgrim Place will send recommendation forms to persons listed on the application. As part of the application process, an on-campus visit is required, including an interview with members of the Admissions Advisory Group and Director of Admission. Visits are arranged once all application materials have been received. Applicants are invited to stay overnight as guests of Pilgrim Place. Upon completion of application and interview, the Admissions Advisory Group will review applications. Approved Applicants are granted “Preliminary Eligibility” and placed on the Housing List according to their desired year of entrance and priority points (see page 2).

If the Admissions Advisory Group does not recommend an applicant for Preliminary Eligibility, one-half of the application fee will be refunded. An applicant who has been refused admission by the Admissions Advisory Group cannot be reconsidered.

MAINTAINING CONTACT WITH PILGRIM PLACE

Approved Applicants are required to maintain annual contact with the Director of Admission to indicate continued interest in retirement at Pilgrim Place and to report any changes of address, health, marital status, employment, or retirement plans.

PRIORITY POINTS

At the time application is made, applicants state their desired year of entrance into Pilgrim Place. Approved Applicants are placed on the Housing List according to their desired year of entrance and number of priority points. (In the case of couples/partners in which both members are eligible for admission, only the Primary Applicant's points will be considered.) The quantitative point evaluation system provides the Administration a guideline for determining housing offers in a particular calendar year. Depending on housing availability, applicants will be offered residency. Due to the limited number of residences, applicants are not guaranteed housing.

The following point system is utilized:

- A. Years of Service – 15 years is the minimum. 5-25 points
 - 16 through 20 years 5 points
 - 21 through 25 years 10 points
 - 26 through 30 years 15 points
 - 31 through 35 years 20 points
 - 36+ years 25 points

- B. Age at desired year of entrance. 2-10 points
 - Age 62 through Age 70 10 points
 - Age 71 8 points
 - Age 72 6 points
 - Age 73 4 points
 - Age 74 2 points
 - Age 75 and above 0 points

- C. Years served outside country of citizenship or on Native American Reservation. 3-20 points

One point is earned for each year over 3 years, for a maximum of 20 points

- D. Date Applied.
 - If application is made 10 years or more prior to desired year of entrance: 10 points
 - If application is made 5 years or more prior to desired year of entrance: 5 points

- E. Supplemental Points.

Housing availability is dependent on the movement of residents on campus. Approved Applicants who may not be offered housing in their desired year of entrance – due to no fault of their own – may lose ranking on the priority list as their names are merged with the following year's list. If Approved Applicants meet all of the following criteria, ten supplemental points will be added each year an applicant is not offered housing. This is meant to compensate for possible loss of ranking. The criteria are as follows:

- Applicant submitted application ten years prior to desired year of entrance,
- Applicant has not refused any housing offer,
- Applicant has not changed desired year of entrance more than one time,
- Applicant has kept in contact with the Admissions office annually in writing, by phone, or with an annual, scheduled office visit.

COMMUNITY EXPECTATIONS

Persons who move to Pilgrim Place commit themselves to supporting the life of this intentional community through their active participation in programs and community meetings. Pilgrim Place residents value and engage in mutual support and assistance for one another. Residents initiate and implement numerous on- and off-campus programs throughout the year, and give of their talents and resources for the encouragement and strengthening of the entire community and its members. In addition, residents are encouraged to provide financial contributions to various aspects of the life of the community beyond their monthly fees. To foster a sense of community, residents participate in the Abernethy Dining Room program for the noon meal.

ENTRANCE INTO PILGRIM PLACE

Entrance into Pilgrim Place is not guaranteed since it is dependent upon the number and type of residences that become available in a given year, the Approved Applicant's priority points as compared with other applicants, and certain financial factors.

One year prior to desired year of entrance into Pilgrim Place, Approved Applicants submit a confidential Financial Information Form provided by Pilgrim Place. Any major transfer of money, property, securities or other assets - gifted or placed in trust after date of application - should be included in the assets summary portion of the form. Approved Applicants must be eligible for Social Security and Medicare.

Approximately six months prior to desired year of entrance, Approved Applicants submit a Medical Information Form. This form is composed of two parts: the first part completed by the applicant and the second part completed by applicant's physician who then returns it to the Director of Admission. The information is reviewed by the Executive Vice President for Health Services and Resident Transitions and a consulting physician. Final decision of occupancy is conditional based on the applicant's health and ability to live within the community.

When offered housing on campus, an Approved Applicant agrees to all policies governing residency at Pilgrim Place, including submitting up-dated financial and medical information, signing a Care and Residence Agreement, and paying an entrance fee. At the time a residence is offered, a payment equivalent of one months' rent and 10% of the entrance fee is required to hold the residence. The Monthly Fee (inclusive of rent, residential fee, and dining fee) will commence when the residence is ready for occupancy.

CONTINUING CARE AND RESIDENCE AGREEMENT

Pilgrim Place is licensed with the State of California as a Continuing Care Retirement Community (CCRC). New residents sign a Continuing Care and Residence Agreement upon entering Pilgrim Place. This Agreement designates the roles and responsibilities of both Pilgrim Place and the resident(s). Residents also receive a Resident Handbook providing an overview of policies. An informative New Resident Notebook and New Resident

Orientation Program assists new residents in becoming familiar with Pilgrim Place and the surrounding area.

ENTRANCE FEES AND MONTHLY FEES

New residents pay a one-time Entrance Fee based on the square footage and amenities of their selected residence. Residents may choose from two options: either a Non-refundable Entrance Fee (a one-time non-refundable fee based on square footage and amenities of the residence) or a Deferred Repayment Entrance Fee (a one-time fee based on a higher rate per square foot and amenities of the residence with 90% payable to one's estate upon reoccupancy of the unit).

For households without sufficient assets to pay an Entrance Fee, a third entrance option may be available. Each year up to three households may be eligible to enter Pilgrim Place without an entrance fee but with a larger Monthly Fee. This option will be limited to residences under 1,000 square feet. Eligibility for this option will be determined by information provided in the confidential financial information form and the Pilgrim Place President/CEO and Vice President/CFO.

Residents pay a Monthly Fee that includes rent, dining service fee, and residential fee.

RESIDENTS' HEALTH AND SUPPORT PROGRAM

Residents who may require financial support for Monthly Fees may apply to the Residents' Health and Support Program (RHSP) for assistance. Starting in 2008, to request RHSP, the maximum monthly income for a couple residing in residential living is \$3,300, and for a single person is \$2,100; the maximum asset ceiling for a couple residing in residential living is \$40,000, and for a single person is \$20,000. Persons who wish to be considered for financial support for Monthly Fees may submit a written request to the Pilgrim Place President/CEO.

LONG TERM CARE INSURANCE AND SUPPLEMENTAL MEDICAL INSURANCE

All new residents who are not covered by long term care and/or supplemental medical insurance are encouraged to apply for coverage. By providing daily benefits for stays in the Health Services Center (skilled nursing) or Pitzer Lodge (assisted living), such insurance may be very cost effective. Persons interested in information on long-term care insurance may contact the Vice President/CFO.

RENOVATIONS

In addition to basic housing preparations, residents who wish to make significant changes or renovations to their chosen residence will work with Buildings and Grounds to determine feasibility, and to arrange for architects and contractors to do the work. A significant down payment is required prior to commencing work. Funds for renovation are separate from the Entrance Fee and will not be deducted from the Entrance Fee.

INTERNAL MOVES

Housing accommodations vary and internal moves may be requested after a resident has resided in the first assigned unit for at least one year. Persons interested in making an internal move may contact the Executive Vice President for Health Services and Resident Transitions and follow the process as described in the internal move policy. In the event of a change in physical or mental condition of resident which, in the opinion of Pilgrim Place, would make

continued residency in certain living accommodations inadvisable, Pilgrim Place may require a move to other housing within Pilgrim Place, or to a higher level of care in Assisted Living or the Health Services Center.

VISITORS

Only Approved Applicants can be considered residents of Pilgrim Place. Parents, children, or other guests may visit, but not live, on campus. Normally, visits should not exceed one month. Residents may reserve Guest Rooms at Porter Hall to accommodate friends and family who visit.

GENERAL POLICIES

Residences are equipped with a refrigerator with icemaker, stove, microwave, dishwasher, and washer/dryer as appropriate for each housing unit. Window coverings are provided. Normally only one car per unit is allowed on campus. One small pet (20 lb maximum) is permitted in compliance with the pet policy. Please note that all policies and fees are subject to change.

CAMPUS VISITS AND TOURS

The best way to become familiar with Pilgrim Place is to visit our community, walk through the campus, and meet current residents. Prospective applicants are encouraged to arrange a campus visit by contacting the Admissions Office at 909-399-5504.

FOR MORE INFORMATION

Staff members are ready to answer your questions and assist you in discerning whether Pilgrim Place is the best place for the next step in your personal journey. To receive more information about Pilgrim Place or arrange a campus visit, please contact the Director of Admission at 909-399-5504. Additional information is also available at the Pilgrim Place web site at www.pilgrimplace.org.

Thank you for your interest in Pilgrim Place!

Pilgrim Place

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