

AMENDED PLAN APPROVED BY THE GRF BOARD  
OCTOBER 2016



# ROSSMOOR

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## GENERAL PLAN 2024



GOLDEN RAIN FOUNDATION

## ACKNOWLEDGMENTS

The Draft (Proposed) Plan approved in 2011 by the Golden Rain Foundation Board of Directors was prepared under the direction of the

### **Ad Hoc Long-Range Planning Task Force:**

Nancy Gracey Bann, Chairman  
Rita A. Fredlund  
Thomas W. Fryer, Jr.  
Carol A. Green  
Mary Hufford  
Ronald W. Moschel  
Clarence H. Nixon  
Sheldon Solloway  
Nancy Bollinger Turnier  
Clair S. Weenig  
Warren Salmons, CEO

The Amended (Proposed) Plan\*, approved by the Golden Rain Foundation Board of Directors on October 27, 2016, was prepared under the direction of the

### **Ad Hoc Task Force to Review the Rossmoor General Plan:**

Donald J. Liddle, Chairman  
Christine A. Bertrand  
F. William Dorband  
Carol J. Edlund  
Mary Hufford  
Robert D. Kelso  
Alice S. Lau  
Alan W. Swanson

\*A copy is available in the Rossmoor Library and on the Rossmoor website at [www.Rossmoor.com](http://www.Rossmoor.com)

The design and format for the 2011 Plan was created and prepared for the Golden Rain Foundation by Design, Community & Environment

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## KEY WORDS FOUND IN THE 2024 GENERAL PLAN

Community = Rossmoor, consisting of 18 Mutuels, their residents, and the land they occupy, plus land and facilities owned by the Golden Rain Foundation in trust for the Mutuels, aka the Valley

GRF = Golden Rain Foundation

GRF Board or Board = Golden Rain Foundation Board of Directors

Mutual = A Mutual is Rossmoor's term for a homeowners' association or a common interest development

Residents = Rossmoor Residents

Task Force = GRF Ad Hoc Long-Range Planning Task Force

The Plan = The 2024 General Plan

TV Channel = Rossmoor TV Channel

\* Amended by the Ad Hoc Task Force to Review the Rossmoor General Plan and approved by the Golden Rain Board of Directors on October 27, 2016.



## GOLDEN RAIN FOUNDATION MISSION STATEMENT

Our mission is to maintain Rossmoor as a premier adult community, in concert with the Homeowners' Associations in which our members reside, and to provide services and facilities that enable our members to lead active, healthy and purposeful lives.

## STATEMENT OF VALUES

To achieve our mission, we will endeavor:

- ◆ To maintain Rossmoor as a safe, secure, stable, attractive, environmentally sensitive, and inclusive community;
- ◆ To provide our members with a wide choice of healthy and stimulating activities with attractive and supporting facilities and sound infrastructure;
- ◆ To be sensitive to the challenges of the aging;
- ◆ To foster transparent, fiscally responsible, representative self governance;
- ◆ To treat our members, staff, Homeowners' Associations, suppliers, and neighbors with respect and integrity;
- ◆ To support our Homeowners' Associations; and
- ◆ To be responsive to the changing needs of our residents and to the world around us.

APPROVED BY THE BOARD OF DIRECTORS OF THE GOLDEN RAIN FOUNDATION  
ON APRIL 28, 2010. \*

\* AN AMENDED GENERAL PLAN WAS APPROVED BY THE BOARD OF DIRECTORS  
OF THE GOLDEN RAIN FOUNDATION ON OCTOBER 27, 2016.

## PLAN INTENT

This General Plan is intended to be long range and comprehensive. Future changes at the Walnut Creek, state, national, international level may affect Rossmoor and its residents in ways this Plan cannot predict. The General Plan and the Vision-Goals-Policies-Actions contained herein are intended to be a tool, to assist future GRF Boards in their planning activities. It specifically is not the intent of the General Plan to mandate or prioritize. When reading this General Plan, it is important that one be cognizant that regardless of the words or phrases used, the intent is advisory and not imperative.

This Plan contains various graphics and background narrative which are only meant to be illustrative of indentified Visions-Goals-Policies-Actions, the operative elements of the plan.

The authors of this Plan recognize that circumstances may dictate that revisions, amendments, and modifications to this Plan may be required. For this reason annual and five-year review cycles are recommended. \*

\* On April 11, 2015, the Golden Rain Foundation Board of Directors appointed the following individuals to the Ad Hoc Task Force to Review the Rossmoor General Plan: Donald J. Liddle, Chairman, Christine A. Bertrand, F. William Dorband, Carol J. Edlund, Mary Hufford, Alice S. Lau, and Alan W. Swanson. On May 28, 2015, Robert D. Kelso was appointed to the Ad Hoc Task Force to Review the Rossmoor General Plan as the GRF Board Representative.

## I INTRODUCTION



### *A. Why Plan for the Future?*

Many external and internal factors drive the need for long range planning in the Rossmoor community. These factors include Rossmoor's age - nearly 50 in 2010; the changing economic environment that results in a larger number of residents who may experience economic difficulties or elect to work full- or part-time; the very large boomer population; a greater expectation of aging in place as opposed to in a nursing home or in the care of extended family; longer life spans than prior generations; and competition from new, nearby retirement communities. A long range plan serves as a road map to help guide the community through the many and varied hurdles these factors present.

Rossmoor is a premier place to live and play, with strong governance institutions, a tradition of participation, and residents who bring diverse experiences to the community. This General Plan establishes goals, policies, and actions to guide the community over the next 14 years as it changes with the times and welcomes new residents.

### ***B. Objectives of the General Plan***

The general objective of this Plan is to set a Vision for Rossmoor that is consistent with the Golden Rain Foundation's mission, and to guide the GRF Board, committees, staff, Rossmoor's independent Mutuals and residents in administration and planning as they meet the challenges of the next 14 years.

The Plan aims to identify demographic, lifestyle, and other trends that may impact the Rossmoor community and to guide decisions that are consistent with a framework of long-term goals.

The specific objectives of this Plan are to:

- ◆ Identify actions that implement the Vision.
- ◆ Prioritize programs and services.
- ◆ Prioritize capital fund investments.
- ◆ Adopt policies, rules, and procedures that concern development and maintenance of Rossmoor's programs and physical facilities.
- ◆ Regularly reassess and modify the plan to meet changing conditions that impact the future direction of Rossmoor and regularly assess progress in realizing the plan's objectives.
- ◆ Allow present and potential board members a means to maintain continuity of direction for Rossmoor's future, as leadership transitions occur.

### ***C. General Plan Update Process***

This Plan was prepared at the direction of the GRF Board and involved significant effort on behalf of members of the community. In particular, the Board established the Task Force to guide the preparation of the Plan. The Task Force consisted of seven resident members representing the wide range of residents as well as a representative of the GRF Board.

The Task Force was appointed in February of 2009. Its efforts began with a tour of Rossmoor and were continued by regular meetings over a period of nearly two years. These meetings were open to residents, who had opportunities to speak through a Residents' Forum as well as to submit input to the Task Force in person or via email, telephone, or letter. The Task Force gathered background information through written materials and meeting with GRF staff; provided input on a community-wide survey that was conducted at the beginning of the General Plan effort; suggested participants for a series of focus groups designed to provide further background information; and then held a series of topic-specific meetings that led directly to the creation of the chapters found in this Plan. Once a draft set of policy statements was created, the Task Force hosted a Town Hall Meeting open to all residents and then reviewed the policy statements in light of the input gathered at that Town Hall meeting. The Task Force also hosted a Town Hall Meeting to review a draft version of the Plan and met with the GRF Board to review the Plan.

### ***D. Contents of this Plan***

This Plan includes this Introduction, the Vision chapter, and the Major Conclusions and Recommendations chapter, followed by twelve topic chapters that set goals, policies, and actions for each subject. The final chapter is devoted to implementation of the Plan. In addition, the Plan has several appendices that provide background information and document community input. A brief description of the topics addressed in the Plan is provided here:

### **1. Environment and Sustainability**

This chapter sets policies related to energy and water conservation, treatment of toxic materials, waste management, and biological resource protection.

### **2. Open Space and Landscaping**

This chapter sets policies regarding the uses and maintenance of open space areas and guides landscaping in the GRF-maintained areas.

### **3. Finance**

This chapter establishes approaches to maintaining Rossmoor's fiscal health, keeping the GRF portion of the coupon as low as possible, and taking advantage of entrepreneurial opportunities.

### **4. Facilities**

This chapter sets policies for management, maintenance, development, and use of GRF-managed and Trust-owned facilities.

### **5. Transportation**

This chapter sets policies for transportation-related infrastructure, including roadways, transit service, and parking, as well as facilities for walkers, cyclists, and persons with disabilities.

### **6. Security**

This chapter sets policies related to the security of the community and emergency response and preparedness.

### **7. Wellness**

This chapter sets policies related to the social, emotional, and physical well-being of residents.

### **8. Social and Recreational Programs and Local Amenities**

This chapter sets policies related to social, cultural, recreational, and educational programs and amenities.

## **9. Communication**

This chapter sets policies guiding communication among GRF Board members, staff, contractors, residents, Mutuals, potential residents, local and State government agencies, and organizations with which Rossmoor works.

## **10. Technology**

This chapter sets policies regarding the use of technology in Rossmoor's key functions.

## **11. Governance**

This chapter establishes approaches to governance, including methods for and renewal of the Trust Agreement.

## **12. Housing and Mutuals**

This chapter sets policies for GRF's relationship with the Mutuals on housing as well as for overall collaboration on matters of common interest.

## **13. Implementation**

This chapter provides policy regarding Plan implementation. It also repeats the policies and actions found in each of the chapters listed above and presents information about how they will be completed, in what order, and by whom.

### ***E. Plan Organization***

Each of the topic chapters contains the following two sections:

- ◆ Background
- ◆ Goals, Policies, and Actions

Goals, policies, and actions, as articulated in this General Plan, are defined as follows:

- ◆ **Goal.** A goal is a description of the general desired result that the Rossmoor community seeks to create through the implementation of its General Plan. One or more goals are provided in each General Plan chapter.

- ◆ **Policy.** A policy, once adopted, is a statement that guides decision-making to achieve a goal throughout Plan implementation. The Term policy as used in this Plan is not to be confused with Policies recommended by the Policy Committee and adopted.
- ◆ **Action.** An action is a program, implementation measure, procedure, or technique intended to help to achieve a goal of the Plan.

As shown in Figure I-1, policies and actions are at the same level. Both are intended to implement goals, which are consistent with the Plan vision articulated in the next chapter. In most cases goals have both implementing policies and actions. However, it is also possible for a goal to be implemented exclusively through either policies or actions.



**FIGURE I-1** GENERAL PLAN COMPONENTS

## 2 VISION



*The following passages provide a vision of how the GRF sees Rossmoor today and will endeavor to maintain it in the future.*

Rossmoor is America's premier active adult community, providing opportunities for residents to both enjoy an active lifestyle and age in place. Residents enjoy their community and feel that their community is safe, convenient, and comfortable. There is a diversity of social, intellectual, cultural, spiritual, and recreational activities for all residents. The community continues to update these activities to adapt to the needs and/or desires of residents.

Residents work together to uphold their community vision and build an understanding of what the community needs and/or desires. They actively volunteer and participate in community events and leadership roles. There is excellent communi-

cation among residents, decision-makers, and GRF employees. There are many opportunities to participate in the governing process, and Rossmoor continues to encourage active participation in governance by its residents.

Residents also cherish the character and high quality of their facilities. These facilities are run by highly qualified staff with assistance from resident volunteers. The community is committed to staying fresh, current, and up-to-date with state-of-the-art facilities.

Rossmoor seeks to be current with technologies that integrate and/or enhance convenience and/or efficiency in areas such as security, communication, governance, transportation, finance, facilities, sustainability, and social functions.

Residents enjoy the Valley's physical beauty. Scenic views, accessible open space, and opportunities for outdoor activities are all important to the residents. Rossmoor strives to reduce the impacts of its operations on the environment, and to preserve and enhance the natural environment.

Rossmoor provides accessible, safe, and effective transportation options suitable for all residents, including connections within Rossmoor to surrounding communities and to the regional transportation system.

The community is also committed to maintaining Rossmoor's affordability. Fiscal responsibility and cost effectiveness are key decision-making factors. Residents should be confident that the GRF's and Mutual Boards' actions are helping them to maintain and enhance their property values.

Finally, the community respects and maintains the cooperative relationship among the GRF, the GRF Trust, and the Mutual corporations. The GRF provides community-wide services and facilities, available to the Mutuals and their members, while also supporting the Mutuals.

### 3 MAJOR CONCLUSIONS AND RECOMMENDATIONS



As the Task Force began to develop recommendations for the Plan in 2010, it realized there was an overriding principle underlying the recommendations. Although this overriding principle is not specifically stated as part of a recommendation, it should be carefully considered with each and every recommendation. The principle is to balance the expenditure of capital and/or operating cost against the available funding, the cost effectiveness of the expenditure, the expected results in terms of meeting the needs and desires of residents, the projected usage, and the timing involved in fulfilling the recommendation.

The major conclusions and recommendations of the Task Force take into consideration 1) the preference exercise of the Town Hall meeting on July 17, 2010, 2) a subsequent ranking exercise conducted by the Task Force, 3) the resident survey of early 2010, 4) the Focus Groups held early in 2010 in which ideas were generated

from residents and real estate professionals, 5) residents' input at 42 Task Force meetings over about a two-year period, and 6) the common themes and ideas that have emerged from Task Force deliberations since February 2009.

These various sources of preferences contributed in unique ways as background information and sources of comparison within the scope of the Plan. The survey generally represented extemporaneous answers to questions posed to a cross section of residents without providing background information. Focus group input was generally directed to specific areas or groups of participants. Those who attended the Town Hall meeting were presented with a large, carefully organized set of draft recommendations about which to voluntarily express preferences. Finally, the Task Force spent almost two years studying in greater depth the specific areas of the Plan and their relationship to each other and to the long term future of Rossmoor.

The fact that the Task Force is presenting the major conclusions and recommendations below does not mean that all these items should or could be started or accomplished in the very near future. Some take considerable advanced planning and/or a considerable amount of funding, so these major conclusions and recommendations need to be considered for implementation in that light. For example, the Trust Agreement does not expire until 2034, but may take a few years of careful preparation in advance since all the Mutuals and the GRF have to agree on the replacement of this central governance document. Likewise, planning and constructing or remodeling various facilities requires both time and funding, both of which may take many years to accomplish.

These major conclusions and recommendations are not strictly in order of importance. However, the Task Force believes them to have the greatest impact on: 1) protecting and preserving what is good about Rossmoor, 2) providing opportunities for residents to enjoy living here, and 3) attracting new residents. The major conclusions and recommendations are as follows:

- I. Provide opportunities for residents to engage in an active lifestyle and age in place. This recommendation is supported through the Vision Chapter, Policy FAC-1.5, Policy WLN-1.1, and Policy SRP-1.1.

2. Manage Rossmoor effectively so that it remains fiscally healthy. Keep the coupon as low as possible while maintaining Rossmoor as a premier community. This recommendation is supported through Goal FIN-1, Policy FIN-1.1, Policy FIN-1.2, and Policy FIN-1.6.
3. Plan modern facilities to meet the needs and desires of residents: 1) by creating one Master Plan for all GRF Trust facilities, and 2) by coordinating this Master Plan with ideas and suggestions offered by clubs, committees, and organizations that are listed in Appendix G, and Task Force suggestions to consider listed in Appendix H. This recommendation is supported through Policy FAC-1.3, Actions FAC-1.1, FAC-1.2, FAC 1.3, FAC-1.5, FAC-1.6, and FAC-1.7.
4. Revise the Trust Agreement or create alternative governing documents by 2034. This recommendation is supported through Policy GOV-1.2 and Action GOV-1.2.
5. Implement the General Plan in a timely and orderly manner. This recommendation is supported through Actions IMP-1.1 and IMP-1.2.
6. Communicate with residents in a timely manner using current technology, including improving websites and providing resources to keep current with best practices and technology/systems management. This recommendation is supported through Policy COM-1.1, Action COM-1.1, Policy TEC-1.1, and Action TEC-1.1
7. Expand transportation opportunities for residents, including considering separate lanes for golf cars and enhancing bus connections to local transportation centers and other locations. This recommendation is supported through Policy TRA-1.4, Policy TRA-2.1, and Action TRA-2.1.
8. Upgrade security where appropriate. This recommendation is supported through Policies SEC-1.1, SEC-1.3 and SEC-1.4, and Action SEC-1.1.
9. Ensure that government is transparent and provides for resident participation and input. This recommendation is supported through Goal GOV-1, Policy GOV-1.3, Policy GOV- 2.1, and Policy GOV-2.2.
10. Coordinate emergency and disaster efforts, including working with Contra Costa County while developing emergency and disaster response programs. This

recommendation is supported through Policies OSL-3.3, SEC-2.2, SEC-2.4, and SEC-2.5, and Actions SEC-2.2, SEC-2.4, SEC-2.5 and SEC-2.7.

11. Increase revenue through private and commercial activity and guest user fees while exploring outsourcing of some services. This recommendation is supported through Policies FIN-2.1, FIN-2.2,, Action FIN-2.1, and Action TRA-2.1.
12. Maintain parks and golf courses as landscaped open areas, and work with the Trails Club with regard to open space. Conserve water and transition toward drought tolerant landscape. This recommendation is supported through Policy FAC-1.2, Policy OSL-2.2, Policy ENV-3.1, Actions ENV-3.2, ENV-3.3, ENV-3.5 and ENV-4.1, Action OSL-4.1, and Policy HMU-1.6.
13. Enhance marketing of Rossmoor by enhancing the positive image of Rossmoor and promote the sale of residential units. This recommendation is supported through Actions COM-1.5 and COM-1.7.

## 4 ENVIRONMENT AND SUSTAINABILITY



### *A. Background*

Rossmoor currently employs a wide variety of sustainable practices. These practices are found throughout the community, including operations related to structures, infrastructure, waste management, and landscaping. Key practices are listed below:

- ◆ Homeowners and Mutuals are encouraged to retrofit homes to improve energy efficiency, including improvements to insulation, windows, plus heating and cooling systems.
- ◆ The GRF provides an extensive recycling program that includes items such as cardboard, green waste, and appliances.
- ◆ Prescription pill and “sharps” disposal service, batteries and hazardous waste collection are available to residents.
- ◆ Turf landscaping areas are being reduced where possible, deer- and drought-resistant plant materials are used whenever possible, outdated irrigation systems are updated. All irrigation controllers were replaced with Smart Controllers

through an East Bay Municipal Utilities District (EBMUD) Rebate program that resulted in 15 to 20 percent savings on water consumption by 2010.

- ◆ Mandated EBMUD water use reductions have been implemented on GRF land, golf course land and mutual-controlled land. Significant landscape use and appearance change are evident here, as in the entire Bay Area, and throughout California, reflecting the many years of extreme drought.
- ◆ Rossmoor has identified heritage trees, and some Mutuals are currently inventorying other important existing trees.

In addition to the efforts listed above, the Rossmoor News presents extensive coverage of environmental sustainability. Similarly, there are presentations on water conservation at Mutual Board and governance meetings, and a water conservation group within the “Sustainable Rossmoor” club organization.

### *B. Goals, Policies, and Actions*

<b>Goal ENV-1</b>	<b>Conservation of energy and resources within Rossmoor.</b>
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#### Policies

- Policy ENV-1.1 Review programs and funding options on an on-going basis to find feasible approaches to energy and water conservation, plus renewable energy.
- Policy ENV-1.2 Meet State energy efficiency standards.
- Policy ENV-1.3 New construction, remodels, and landscaping projects should minimize heat island effects and runoff, plus maximize irrigation and rainwater infiltration.
- Policy ENV-1.4 Evaluate siting of new buildings to determine if active or passive solar heating and cooling opportunities exist, and, if so, whether to build them in initially or simply design new buildings to anticipate future potential alternative energy systems, such as solar panels.

- Policy ENV-1.5 Consider Leadership in Energy and Environmental Design (LEED® [www.leed.usgbc.org](http://www.leed.usgbc.org)) standards for new construction, and take costs for certification under consideration.
- Policy ENV-1.6 When purchasing fleet vehicles, consider the lowest-polluting and most energy-efficient vehicles under the funding programs.
- Policy ENV-1.7 Publicize energy-saving ideas, including the 'Hot Day Program', through all available community media, including the Rossmoor News, website, television and similar community-wide outreach.
- Policy ENV-1.8 Support Rossmoor-wide, mutual and individual-funded solar power and water heating, water conservation or re-use (such as grey water) programs. Support other such initiatives as a way to enhance Rossmoor's stewardship of our resources, Rossmoor's place as a leader in energy conservation and environmental sustainability, as well as cost effective, community management.

### **Actions**

- Action ENV-1.1 Consider implementing the recommendations of energy alternative and sustainability organizations and committees on an on-going basis, as funds are available.
- Action ENV-1.2 Incorporate energy, water and resource conservation into administrative policy to ensure that conservation is part of every employee's job.
- Action ENV-1.3 Establish energy-saving policies for GRF fleet vehicles, including reducing idling times, reviewing routes for efficiency, and utilizing all cost-effective, fuel energy sources, when available.
- Action ENV-1.4 Study retrofitting lighting to LED.

**Goal ENV-2 Minimal use of toxic materials throughout the community.**

**Policies**

- Policy ENV-2.1 Use low or non-toxic building materials and integrated pest management when feasible.
- Policy ENV-2.2 Use organic or non-toxic housekeeping products at all GRF locations when feasible.
- Policy ENV-2.3 Consider conversion to air drying machines after handwashing in public bathrooms, instead of paper towels, reducing paper use and maintenance.

**Goal ENV-3 Water conservation throughout the community.**

**Policies**

- Policy ENV-3.1 Seek to reduce water demand for landscaping, including implementing landscaping and irrigation standards and restrictions developed by the state, City of Walnut Creek and East Bay Municipal Utility District.
- Policy ENV-3.2 Publicize and encourage water-saving ideas through all available Rossmoor media, including the Rossmoor News and similar community-wide outreach.

**Actions**

- Action ENV-3.1 Explore additional opportunities for use or re-use of non-potable water for landscape irrigation and groundwater recharging.
- Action ENV-3.2 Maintain and review efficient irrigation use and water use reduction, using technology as well as visual monitoring.
- Action ENV-3.3 Evaluate new advances in drip irrigation and other water saving practices and devices for retrofit and new landscape.
- Action ENV-3.4 Consider separation of potable and non-potable water lines in remodel and new construction.

Action ENV-3.5 Prioritize onsite water retention and water table recharging through bio-swales and other practices.

<b>Goal ENV-4</b>	<b>Protection of biological resources in Rossmoor.</b>
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**Policies**

Policy ENV-4.1 Educate residents and employees about landscaping that provides habitat for sensitive species found in Rossmoor. When possible, use that type of landscape material, while discouraging invasive and nuisance species.

**Actions**

Action ENV-4.1 Identify key habitat areas and ensure that hiking and other outdoor recreational activities are sensitive to species found in them.

Action ENV-4.2 Continue to identify heritage trees located in Rossmoor and protect them per the Walnut Creek Tree Preservation Ordinance.

Action ENV-4.3 Review landscape chemicals for negative impact.

Action ENV-4.4 Minimize light pollution where appropriate.

<b>Goal ENV-5</b>	<b>Balance between the enjoyment, the practicality, and the health issues of living with wildlife.</b>
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**Policies**

Policy ENV-5.1 Balance the enjoyment of living with wildlife with the practicality of dealing with the overpopulation of some species and the health issues that these species create.

Policy ENV-5.2 Educate residents about the impacts of feeding and watering wildlife, especially through outside pet feeders.

Policy ENV-5.3 Recognize the overpopulation of Canada geese, turkeys and deer in the community, and consider ways to reduce their presence.

### Actions

Action ENV-5.1 Manage goose, turkey and deer populations to address safety, health and cleanliness issues related to their overpopulation.

<b>Goal ENV-6</b>	<b>Reduced waste generation in Rossmoor through creative solutions to waste management.</b>
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### Policies

Policy ENV-6.1 Purchase and use recycled materials whenever feasible.

Policy ENV-6.2 Expand the range of materials recycled at Rossmoor as new recycling programs become available.

Policy ENV-6.3 Expand recycling programs in GRF buildings, with a focus on educating residents and employees on its benefits, and provide clear information about recycling options. Include the Activities Council in this effort, with a focus on reducing the use of non-renewable materials and resources associated with club and GRF events.

Policy ENV-6.4 Reduce green waste.

### Actions

Action ENV-6.1 Expand hazardous waste collection options and disseminate collection information regularly through all available Rossmoor media.

Action ENV-6.2 Prioritize reusing or recycling green waste within Rossmoor, as feasible.

Action ENV-6.3 Evaluate opportunities to market green waste.

Action ENV-6.4 Develop a program with an outside agency to accept recycled appliances and household goods.

Action ENV-6.5 Review current landscape practices to minimize green waste and maximize use of beneficial landscape debris and mulch.

## 5 OPEN SPACE AND LANDSCAPING



### *A. Background*

The GRF manages extensive open space and landscaping. The open space provides an invaluable rural ambience as well as wildlife habitat, forming an attractive backdrop to the Rossmoor community.

Rossmoor's open space covers over 700 acres within which the Trails Club maintains 4.5 miles of trails. Adjacent public open space includes Las Trampas Regional Wilderness, with trail connections, and East Bay Municipal Utility District (EBMUD) property. Ecosystem types within the open space include riparian woodland, oak

woodland, brushland, and grassland savanna. Wildlife includes 120 species of birds, deer, fox, mountain lion, coyotes, reptiles, amphibians, invertebrates, and insects.

Landscaping includes approximately 25,000 trees, on both Mutual and Trust properties. GRF landscaping crews maintain park areas around clubhouses, and other landscaped areas not part of Mutual properties. Landscaping is increasingly focused on deer-resistant, turkey resistant, and drought resistant plants, a broad palate of which is available. Irrigation is primarily controlled via satellite or other updated controls.

*B. Goals, Policies, and Actions*

<b>Goal OSL-1</b>	<b>Preserve open space areas that buffer Rossmoor from surrounding development.</b>
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Policies

Policy OSL-1.1 Protect the hill slopes and ridgelines surrounding Rossmoor's developed area through efforts such as working with surrounding open space property owners, including the East Bay Regional Park District and East Bay Municipal Utility District, to support attractive and continued open space uses of these properties.

Policy OSL-1.2 Look for opportunities to acquire adjacent property or excess Mutual land.

<b>Goal OSL-2</b>	<b>Preserve open space areas that provide opportunities for active and passive enjoyment.</b>
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Policies

Policy OSL-2.1 Enhance views of Rossmoor's open space areas.

Policy OSL-2.2 Support the Trails Club's efforts to provide a seamless connection to Rossmoor roads/ sidewalks, mapping, signage, appropriate

expansion, and maintenance of trails within Rossmoor's open space areas.

Policy OSL-2.3 Ensure that new uses of GRF's open space do not detract from the overall attractiveness of the open space area.

<b>Goal OSL-3</b>	<b>Maintain open space areas.</b>
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**Policies**

Policy OSL-3.1 Maintain drainage within GRF's open space to reduce the risk of landslides and subsidence in hillside areas.

Policy OSL-3.2 Maintain fencing within GRF's open space to reduce the risk of unauthorized access.

Policy OSL-3.3 Work with the Contra Costa County Fire Department and the Mutuels to minimize fuel load, maintain fire breaks, and establish defensible space to comply with Contra Costa County requirements.

**Actions**

Action OSL-3.1 Study Tice Creek throughout Rossmoor to determine whether additional measures to reduce erosion are necessary.

Action OSL-3.2 Be open to the potential for conservation easements to be sold as mitigation.

Action OSL-3.3 Identify open space areas that could be developed if needed.

<b>Goal OSL-4</b>	<b>Prioritize landscaping throughout Rossmoor that provides natural beauty and is both durable and environmentally-friendly.</b>
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### **Policies**

Policy OSL-4.1 Provide attractive, sustainable, and colorful landscaping for Trust facilities and properties.

### **Actions**

Action OSL-4.1 Update GRF landscaping, by reducing lawns, and refurbishing landscape areas, trees, and irrigation systems, with consideration of transitioning to more drought-tolerant, deer and turkey resistant plants, native plants and water conserving irrigation.

## 6 FINANCE



### *A. Background*

This section describes the key features of Rossmoor's financial management, with a focus on the GRF.

The Coupon charged by each of the Mutuals is used to a) fund the costs of operations of the Mutual, and b) pay the carrying charges which cover the costs of operation of GRF per the terms of the Trust Agreement. The Coupon is collected monthly by each Mutual from residents of each manor.

GRF has three principal sources of operating cash: 1) payment of carrying charges received by GRF from the Mutuals out of the Coupon payments collected by the Mutuals, 2) payments from the Mutuals for services provided directly to the Mutuals

by the Mutual Operations Division of GRF, and 3) fees and sales proceeds from residents, clubs, and non-residents for goods and services provided by GRF.

Revenue for GRF's Trust Fund comes primarily from membership transfer fees, which are reviewed periodically, and medical center rent. The Trust Fund is used for capital projects/equipment. When additional capital funds are required, loans can be taken out and are repaid from the Trust Fund.

The annual budgeting process includes review of operating expenses for each department, the maintenance budget for Trust facilities/properties and a forecast of operating cash needed to cover unforeseen expenditures. Budget principles are used annually to establish the GRF Board's approach to development of the budget. Revenue-enhancing opportunities are identified each year during the GRF budget process.

GRF performs a role similar to that of maintenance, landscaping and recreation departments of a small city of almost 10,000 residents, and a substantial budget for same, as well as planning.

### *B. Goals, Policies, and Actions*

**Goal FIN -I      A fiscally healthy GRF that plans for the future and responds to the needs and desires of Rossmoor residents, consistent with Rossmoor's standing as a premier adult community, including keeping the Coupon as low as reasonably possible.**

### **Policies**

Policy FIN-I.1      Balance the expenditure of capital and/or operating cost against the available funding, the cost effectiveness of the expenditure, the expected results in terms of meeting the needs and desires of residents, the projected usage, and the timing involved in fulfilling the recommendation.

- Policy FIN-1.2 Keep the GRF portion of the Coupon as low as possible while providing a range of programs, services, and facilities. Balance the needs and desires for expansion and modification with their impact on the Coupon.
- Policy FIN-1.3 Use the GRF budgeting process to review ongoing expenditures and one-time capital expenditures and to review specific needs and desires for new or improved facilities.
- Policy FIN-1.4 Ensure that expenditures, including those recommended by actions within this Plan, are as cost effective as possible while also meeting the needs and desires of Rossmoor residents.
- Policy FIN-1.5 Undertake capital projects to the extent that they can be funded with available Trust funds or loans whose repayment through Trust funds can be projected using fiscally sound budget principles. Consider cost of maintenance and upgrades when evaluating cost of new facilities.
- Policy FIN-1.6 Review the impact of ongoing operating costs for new facilities on GRF's operating budget and Coupon charges when deciding whether to develop such facilities.
- Policy FIN-1.7 Periodically review programs and services to ensure they are providing cost-effective, quality services and resulting in desired outcomes.
- Policy FIN-1.8 Review obligations to employee salary and benefit programs, as well as the impact of these programs on the GRF portion of the Coupon and on recruitment and retention of employees.

### **Actions**

- Action FIN-1.1 Periodically analyze the direct cost of GRF services provided by staff to determine whether they are cost effective. The analysis should include a comparison of the cost of outsourced services without sacrificing quality or other aspects of the services important to Rossmoor residents.

Action FIN-1.2 Consider the impact on the Long Range Capital Project Plan for all major spending decisions.

Action FIN-1.3 Maintain an operating reserve to address future needs and to help prevent significant fluctuations in future budgets.

<b>Goal FIN -2</b>	<b>An organizational culture that continually seeks entrepreneurial opportunities and expanded revenues consistent with the needs and expectations of Rossmoor residents.</b>
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**Policies**

Policy FIN-2.1 Develop programs to enhance “outside” revenue from GRF facilities and services utilizing existing activities and expertise. Focus additional revenue on the provision of services to residents with minimal increase of the GRF portion of the Coupon or other fees to residents.

Policy FIN-2.2 Encourage both private and GRF run commercial activities in GRF’s facilities, consistent with Rossmoor’s values and with an emphasis on filling the needs of Rossmoor residents and attracting Rossmoor residents as patrons.

**Actions**

Action FIN-2.1 Review ideas for revenue enhancement to determine which should be implemented consistent with GRF policies.

<b>Goal FIN -3</b>	<b>GRF recognizes the need for, and the value of, a strong system of internal control and transparency.</b>
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**Policy**

Policy FIN-3.1 Ensure effective and efficient internal controls are in place to achieve GRF objectives in operations, financial reporting and compliance with applicable laws and regulations.

Actions

- Action FIN-3.1 Engage a qualified audit firm to conduct an annual audit using generally accepted auditing standards.
- Action FIN-3.2 Consider posting on Rossmoor website the GRF and related entities' monthly financial statements and Finance Committee agenda packages.
- Action FIN-3.3 Consider posting link on Rossmoor website to public information filings.

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## 7 FACILITIES



### *A. Background*

Rossmoor provides a wide range of facilities, allowing residents to participate in social, recreational, and fitness activities; communicate inside and outside the community; and connect to regional utilities.

The GRF has three swimming pool facilities, generally open seven days a week, with family-swim open at Hillside Pool for at least two hours six days a week. The Del Valle pool, extensively renovated in 2006-2007, is enclosed and provides lap facilities as well as a warm-water area. The Dollar pool facilities were renovated in 2001 and 2012. The Hillside pool facilities were renovated in 2010.

The fitness center, under review for renovation, offers approximately 98 classes per week, cardiovascular equipment, weight machines, and fitness trainers working with individuals and groups.

Rossmoor's two golf courses, Creekside and Dollar Ranch, cover 150 acres and represent two different types of course. The Dollar Ranch course is 18 holes and spread out over a hilly area. The Creekside course is nine holes and more easily walkable than Dollar Ranch. Both courses are maintained regularly with satellite-controlled sprinklers re-using water on-site. There are four resident golf club organizations. The golf courses provide guest access, host tournaments, and make available golf carts and equipment.

There are six clubhouses: Gateway, Dollar, Del Valle, Hillside, Creekside and the Event Center. Venue reservations within clubhouses and other GRF locations are handled by the Recreation Department. In the case of all clubhouses, demand is high for rooms with kitchen space. Creekside facilities include a social building with meeting rooms, a pro shop, and a restaurant kitchen/bar, a building for Rossmoor News, the TV channel, Cart Barn, and a public safety and maintenance building.

Other recreation facilities include bocce courts, tennis courts, lawn bowling greens, a table tennis building, arts and crafts rooms, and a pool/billiard room. In addition to these facilities, Rossmoor has seven parks, several equipped with picnic areas. The dog park is adjacent to the Del Valle Clubhouse parking lot.

Rossmoor has over 200 clubs which make use of various facilities. Clubs include movies, athletics, games, arts and crafts, social, intellectual, political, religious and special interests. Facilities usage is steadily increasing.

Rossmoor's two libraries are located at Gateway Clubhouse and Dollar Clubhouse. The Gateway Clubhouse library has computerized files and the Dollar Clubhouse library uses an "honor system" for checking out books. GRF works with the Walnut Creek Library to provide residents with access to all its materials on a request and delivery basis.

Utility providers include East Bay Municipal Utility District (EBMUD) for water service, Pacific Gas & Electric (PG&E) for gas service, Marin Clean Energy (MCE) for

electric service, Central Contra Costa Sanitary District for sewer, AT&T and Comcast for land-line phone services, Republic Services for waste removal, and Comcast for cable and broadband. Storm drains flow to Tice Creek and are maintained by GRF and/or the Mutuels. Sidewalks and streets are owned and maintained by GRF and some Mutuels. Cable TV service and broadband are included in the monthly GRF Coupon and limited wireless network access is provided by GRF in all club-houses.

*Note that information regarding facility needs submitted by the following Rossmoor committees, clubs, and organizations is included in Appendix G: Community Emergency Response Team, Drama Association, GRF Fitness Center Advisory Committee, Garden Club, GRF Golf Advisory Committee, Pickle Ball Club, Tennis Club, and Table Tennis Club. Long Range Planning Task Force suggestions for a Facilities Master Plan are included in Appendix H.*

***B. Goals, Policies, and Actions***

<b>Goal FAC-1</b>	<b>Modern facilities that meet the needs of Rossmoor residents.</b>
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**Policies**

- Policy FAC-1.1     Maintain and enhance all GRF clubhouse facilities and grounds as appropriate to the social, intellectual, cultural, spiritual, and recreational needs and desires of residents.
  
- Policy FAC-1.2     Maintain and enhance the parks and golf courses for recreation and as open area focal points.
  
- Policy FAC-1.3     Continually refer to a Facilities Master Plan when considering usage, accessibility, storage, food service, etc. to meet the needs and desires of a) residents, b) clubs and organizations, c) committees, and d) GRF sponsored events. See Appendix H for suggestions.

- Policy FAC-1.4 Consider adopting additional maintenance practices for GRF facilities which include “green” concepts and energy and water conservation programs.
- Policy FAC-1.5 Provide access and usage of GRF facilities/properties to all residents, regardless of disabilities, whenever economically feasible or legally required.
- Policy FAC-1.6 Update interiors of GRF facilities on a routine basis to ensure high quality.
- Policy FAC-1.7 Provide on-site food service at appropriate GRF facilities.
- Policy FAC-1.8 Consider the use and/or purchase of the former Del Valle High School facilities.
- Policy FAC-1.9 Review the status and priority of proposed major capital facilities projects annually.

### **Actions**

- Action FAC-1.1 Explore expanding commercial services consistent with Rossmoor’s core values as expressed in the Mission Statement using GRF land and buildings that can be made available to meet residents’ needs.
- Action FAC-1.2 Renovate the Del Valle Clubhouse to accommodate an expanded and enhanced Fitness Center, meeting spaces, and other facilities, as recommended by the Residents’ Task Force in 2014, and other studies.
- Action FAC-1.3 Consider ideas and suggestions offered by organized groups (see Appendix G) in a coordinated manner as usage, funding, and competing desires warrant.
- Action FAC-1.4 Explore additional parking at GRF facilities as needed.
- Action FAC-1.5 Continue to develop a Facilities Master Plan and update annually, and use it as a planning tool for budgeting and project development.

- Action FAC-1.6 Study the rehabilitation of the Hillside and Dollar Clubhouses.
- Action FAC-1.7 Consider upgrading the Gateway multi-purpose rooms, and arts and crafts rooms.

<b>Goal FAC-2</b>	<b>A balance between the competing demands for facility use.</b>
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Policies

- Policy FAC-2.1 Maintain and enforce rules and policies that allow for fair and orderly use of GRF facilities by Rossmoor residents and clubs.
- Policy FAC-2.2 Permit renters, guests and other non-residents to use GRF facilities when appropriate and feasible, charging guest fees for use, where feasible, to ensure that they generate revenue for the community and that non-resident use does not negatively impact the availability or quality of facilities for residents.
- Policy FAC-2.3 Where possible, specialized GRF facilities used by clubs should be managed by those clubs.
- Policy FAC-2.4 Use coordinated, efficient technology to obtain GRF facility access and usage data and to enable appointments and reservations for facilities and events.

Actions

- Action FAC-2.1 Continue to develop a means by which residents' needs and interests can be reviewed and considered. See 2010 Appendix I and 2015 comments.
- Action FAC-2.2 Continue to develop amenities and activities to keep pace with demands.
- Action FAC-2.3 Make available to residents a summary of the GRF Board's review of future facilities projects.

<b>Goal FAC-3</b>	<b>Utilities that provide adequate capacity to meet Rossmoor's needs.</b>
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Policies

Policy FAC-3.1 Ensure that water, gas, electric, communication, and sewer services are available and upgraded as needed.

Actions

Action FAC-3.1 Consider installing solar equipment to reduce utility costs.

Action FAC-3.2 Consider modernizing rest room facilities to meet water conservation recommendations.

Action FAC-3.3 Consider exploring the feasibility of a water reclamation facility.

## 8 TRANSPORTATION



### *A. Background*

Transportation in Rossmoor includes bus service as well as the vehicular and pedestrian network. This infrastructure is critical to residents' access and connections throughout the community and neighboring communities.

There is an extensive network of roads, sidewalks, and trails. For private autos, existing roadways operate satisfactorily with speed monitoring signs and limited traffic calming measures. Safety issues include blind turns on some streets and intersections, and drivers speeding or not stopping at intersections. There is a high demand for parking. When new parking lots are created or existing ones resurfaced, priority should be given to creating handicapped spaces and some spaces created for golf-cars only.

Bus services include fixed routes, a Dial-a-bus system, paratransit, and ‘Travel Training’ offering first-time users tailored rides to help them learn the bus system. The GRF is always seeking ways to improve the bus service without expanding the budget.

To ensure pedestrian safety, sidewalks are inspected and repaired annually. Some intersections could be modified to improve pedestrian safety and comfort. Open space hiking and walking trails could be better connected physically to Valley sidewalks, as well as visually connected with signage.

Buses have bike racks for cyclists. However, bicycle facilities are otherwise limited. Existing road widths cannot accommodate bike lanes without removing parking or reducing travel lanes. In addition, the hilly topography throughout Rossmoor minimizes opportunities for cycling.

*B. Goals, Policies, and Actions*

**Goal TRA-1     A safe and user-friendly roadway system that provides for vehicle travel in Rossmoor and connects to outside roadways.**

Policies

- Policy TRA-1.1     Maintain Rossmoor’s existing private roadway network in good physical condition.
- Policy TRA-1.2     Actively engage City, County and other government agencies to maintain public ingress and egress routes as well as emergency access roads in good physical condition.
- Policy TRA-1.3     Expand safety on Rossmoor’s roadways through the implementation of structural and non-structural measures such as encouraging driver training, provid-

ing safety information, and installing current traffic control techniques.

- Policy TRA-1.4 Evaluate and expand available transportation mobility options for Rossmoor residents, including options such as electric cars, bicycles, golf-carts, car-pooling, car-sharing, shuttle services, and new transportation technologies.
- Policy TRA-1.5 Encourage use of energy efficient transportation. Prioritize “low hanging fruit” solutions for problem intersections that will provide immediate and low cost improvement.
- Policy TRA-1.6 Enforce the California Vehicle Code and Walnut Creek Municipal Code on Rossmoor’s streets through the City of Walnut Creek.
- Policy TRA-1.7 Evaluate outsourcing as an option to provide all or part of the transportation services.

**Actions**

- Action TRA-1.1 Identify and improve roadways to enhance safety, including re-striping lanes, stop signs, and other signage and mirrors to expand visibility.
- Action TRA-1.2 Study existing GRF parking lots, including counting parking usage, to determine if and where additional handicapped and golf-cart parking spaces should be located. As a part of this study, evaluate whether the parking lots will provide sufficient parking in the long-term and where additional parking may be needed.
- Action TRA-1.3 Continue to encourage safe driving on Rossmoor’s roads. This program should encourage drivers in Rossmoor to participate in driver education programs and to drive only if they are safe drivers.

- Action TRA-1.4 Develop a program to improve traffic safety and reduce accident rates.
- Action TRA-1.5 Study the provision of new or improved facilities, including dedicated golf car/bicycle lanes, for golf-car circulation either on or parallel to the Valley's major streets.
- Action TRA-1.6 Evaluate the need, feasibility and cost/benefit for electric vehicle charging stations at Rossmoor's public facilities.
- Action TRA-1.7 Continue to partner with Walnut Creek Police Department to maintain a visible, traffic enforcement presence.
- Action TRA-1.8 Identify, prioritize and implement improvements at problem intersections that will provide immediate, relatively low cost improvement to Rossmoor's safe environment for drivers and pedestrians.
- Action TRA-1.9 Evaluate outsourcing as an option to provide all or part of the transportation services.

<b>Goal TRA-2</b>	<b>A transit system that provides access for Rossmoor residents within Rossmoor and connections to key outside destinations.</b>
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Policies

- Policy TRA-2.1 Provide transportation within Rossmoor and that connects to key locations outside of Rossmoor such as BART, Downtown Walnut Creek, and shopping areas.
- Policy TRA-2.2 Provide 'Travel Training' for first-time bus users and other outreach to familiarize residents with the bus system.

### Actions

- Action TRA-2.1 Regularly analyze the bus system in order to maximize its efficiency, cost-effectiveness, and usefulness to residents. (Last studied in 1995)
- Action TRA-2.2 Publicize 'Travel Training' through all available media within Rossmoor to entice maximum ridership.
- Action TRA-2.3 Consider tracking devices for GRF buses to enhance effectiveness.

<b>Goal TRA-3</b>	<b>Appropriate transportation facilities for pedestrians, cyclists, and disabled persons.</b>
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### Policies

- Policy TRA-3.1 Provide and maintain sidewalks and pedestrian paths throughout Rossmoor focusing on pedestrian safety.
- Policy TRA-3.2 All new construction or major building renovations shall meet ADA requirements and utilize techniques to ensure access for persons with disabilities.

### Actions

- Action TRA-3.1 Evaluate existing roadways and intersections to determine where they could be modified for pedestrian safety and comfort.
- Action TRA-3.2 Evaluate connections between existing open space trails and residential areas, sidewalks, and community facilities.

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## 9 SECURITY



### *A. Background*

Security services provide a protected and safe environment for residents and visitors and range from on-site services to emergency preparedness. Crime is substantially lower in Rossmoor than in Walnut Creek in general, which itself is a very low crime city.

Rossmoor's security currently includes a contract with Securitas, a private security company, to provide 24-hour staffing and patrol of the entry gates, 24-hour basic Emergency Medical Technicians, and Stair-Trac service. The entry gate serves as a filter, but cannot provide absolute security. The Public Safety dispatcher reviews security calls directed to the Rossmoor security line and contacts 911 as needed. Rossmoor responders usually arrive before police/fire/paramedic services. Incident

calls are referred as-needed to the Walnut Creek Police Department by Public Safety.

In addition to security responses, Public Safety coordinates emergency preparedness, including maintaining and updating GRF's Emergency Response and Preparedness Plan, working with Walnut Creek's Rossmoor Area Community Emergency Response Team (CERT) and working with the Emergency Preparedness Organization (EPO), entry coordinators, the Mutuals, and other interested entities. Additionally, GRF and the Mutuals collaborate on providing a 100-foot defensible space around all buildings that are adjacent to open space areas.

*B. Goals, Policies, and Actions*

<b>Goal SEC-1</b>	<b>A safe and secure community.</b>
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Policies

- Policy SEC-1.1 Balance 24-hour security with convenient access and privacy for residents.
- Policy SEC-1.2 Strive to ensure that Rossmoor receives an adequate share of police and traffic safety patrols from the City of Walnut Creek.
- Policy SEC-1.3 Use monitoring devices capable of storing images for later review and/or real time closed circuit monitoring to provide enhanced security as appropriate.
- Policy SEC-1.4 Analyze data about security incidents on an on-going basis: then adjust Public Safety responses and crime prevention education based on the types of incidents that occur.

Actions

- Action SEC-1.1 Study ways to upgrade entry gate security technology, including vehicle, delivery, bicycle, and walk-in traffic. During this process, review how service providers and guests are given access to the

community and consider ways in which greater security could be provided without resulting in undue difficulty of access.

Action SEC-1.2 Investigate development of a second entry/exit for resident use. Completed and deemed not feasible.

Action SEC-1.3 Study ways to analyze data about security incidents and adjust Public Safety and Walnut Creek Police Department responses based on the types of incidents that occur.

<b>Goal SEC-2</b>	<b>An ability to respond to emergencies and disasters.</b>
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**Policies**

Policy SEC-2.1 Maintain the capacity for GRF to provide first-response to emergencies.

Policy SEC-2.2 Coordinate emergency and disaster response efforts with Rossmoor residents and organizations, the City of Walnut Creek, and other emergency responders.

Policy SEC-2.3 Ensure emergency access routes are clear and coordinated with neighboring property owners.

Policy SEC-2.4 Work with the Mutuals to clear defensible space in areas surrounding Mutual and GRF buildings.

Policy SEC-2.5 Support emergency and disaster preparedness activities, including fire prevention education, earthquake preparedness, personal safety education, and other educational programs tailored to Rossmoor's population.

Policy SEC-2.6 Assure continuity of critical GRF operations during power outages and emergencies.

### Actions

- Action SEC-2.1 Study emergency assistance access to allow GRF staff and emergency providers to enter resident manors in case of emergency.
- Action SEC-2.2 Maintain and as necessary update GRF's All Hazards Emergency Operations Plan. The plan describes how GRF will work together with the City, various resident emergency response organizations, and Rossmoor residents in emergency situations.
- Action SEC-2.3 Sponsor GRF Board of Directors and staff training and drills in Incident Command Structure (ICS) responsibilities.
- Action SEC-2.4 Continue resource support for resident-driven disaster response organizations by providing training resources and procuring necessary equipment and supplies.
- Action SEC-2.5 Include disaster response communication, training information, access to standard operating procedures and documentation on the existing Rossmoor website.
- Action SEC-2.6 Establish an emergency communication system for the residents. Coordinate this communication with First Responders.
- Action SEC-2.7 Assess status and anticipate needs to facilitate maintenance of critical GRF operations during emergencies and provide for the continuation of those operations.

## 10 WELLNESS



### *A. Background*

Supportive wellness services foster a vibrant, healthy, and active community. The programs offered afford resident's opportunities to augment daily life with social, emotional, and physical support services through classes, counseling, clubs, and events. Support includes Stair-Trac service, welfare checks, paratransit, over 120 fitness, nutrition, and physical education classes, home safety improvements, and counseling services. Counseling services include in-home assessments, short-term counseling, support groups (such as grief counseling), Wisdom Circles, crisis intervention, referring residents to sources of financial assistance, long-term care planning, the Rossmoor Women's and Men's Conferences, and a Health and Safety Fair.

*B. Goals, Policies, and Actions*

<b>Goal WLN-1</b>	<b>An environment that supports residents in maintaining their independence as well as their social, emotional, and physical well-being.</b>
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Policies

- Policy WLN-1.1 Coordinate programs and services to facilitate residents in maintaining their health and independence, with special attention to residents who need some assistance to age in place.
- Policy WLN-1.2 Support the fitness center and other recreational facilities and services that promote an active healthy lifestyle.
- Policy WLN-1.3 Support clubs/organizations and counseling services to respond to residents' wellness issues, including social, intellectual, cultural, spiritual, and recreational needs and desires. Examples of activities include social gatherings, physical activities, and short-term financial-aid to needy residents.
- Policy WLN-1.4 Continue using counseling services to provide referrals for residents who need financial assistance.

Actions

- Action WLN-1.1 Create an ongoing program to publicize information regarding wellness services.
- Action WLN-1.2 Consider expanding the counseling services.
- Action WLN-1.3 Facilitate resolution of communication issues among residents through the counseling services provided by GRF.

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## II SOCIAL AND RECREATIONAL PROGRAMS AND AMENITIES



### *A. Background*

The social and recreational programs and amenities offered by the GRF, by resident clubs, and collaboratively between the two constitute a key aspect of Rossmoor that makes it such a desirable community. These programs and amenities provide outlets for social interaction, community service, religious observance, cultural experiences, fitness, and recreation.

Volunteers provide a variety of valuable services, including programs serving recreational centers and events, and weekly lunches. Counseling Services and Recreation coordinate volunteer activities.

Over 200 clubs and organizations at Rossmoor provide service, cultural, support, social, fitness, sports, arts and crafts, political, spiritual, and heritage activities. Clubs are supported by the community through the provision of meeting space and other facilities and lockers for storage. In general, clubs do not have dedicated meeting space, but some clubs are responsible for specialized spaces tailored to their needs.

Recreational programs include annual parties, a weekly Spotlight , monthly dances, regular movie showings, ticketed performances, and day trips and tours. A weekly summer farmers' market brings fresh produce to the community.

Adult education programs at Rossmoor are provided in collaboration with local schools, including offerings showcasing the talents and knowledge of Rossmoor residents. These programs cover a wide array of topics of interest to residents. The school district collaborates with the Computer Center, which provides educational and recreational opportunities through computer-based learning.

In addition to the programs and amenities described above, GRF provides access to services that benefit community members. These include the Handyman program (available for purchase), club and organization insurance negotiated at a group rate, safe driver training, and financial assistance administered through Counseling Services. These amenities add to the convenience of living in Rossmoor.

***B. Goals, Policies, and Actions***

**Goal SRP-1      A wide range of social, cultural, and recreational opportunities appealing to the diversity of Rossmoor residents.**

**Policies**

- Policy SRP-1.1      Balance the provision of social, cultural, and recreational opportunities that serve active residents with opportunities for those who are physically challenged in their ability to participate.
  
- Policy SRP-1.2      Support groups, clubs, and organizations undertaking social, cultural, and recreational activities, including active recreation such as

sports, through provision of appropriate space and facilities and administration of insurance.

Policy SRP-1.3 Encourage volunteerism by identifying and publicizing volunteer opportunities.

Policy SRP-1.4 Provide a travel and excursion program on a cost-recovery basis which may expand or contract as usage and interest indicate.

Policy SRP-1.5 Provide a variety of performances, including movies, live entertainment, readings, and other events of interest to Rossmoor residents.

Policy SRP-1.6 Provide recreational and social opportunities throughout the week, including evenings and weekends, to ensure that working and non-working residents can enjoy them.

**Actions**

Action SRP-1.1 Continue providing outdoor activities during the warm months which should be focused on food, enjoyment, and be broadly desirable to all residents.

Action SRP-1.2 Consider expanding movie offerings, in terms of the variety of movies shown and the number of showings of popular features.

Action SRP-1.3 Continue to work with the Activities Council to assess current locker storage needs for clubs and organizations and assess an annual fee for locker use.

<b>Goal SRP-2</b>	<b>Cultural and educational programs that provide opportunities for life-long enjoyment and learning.</b>
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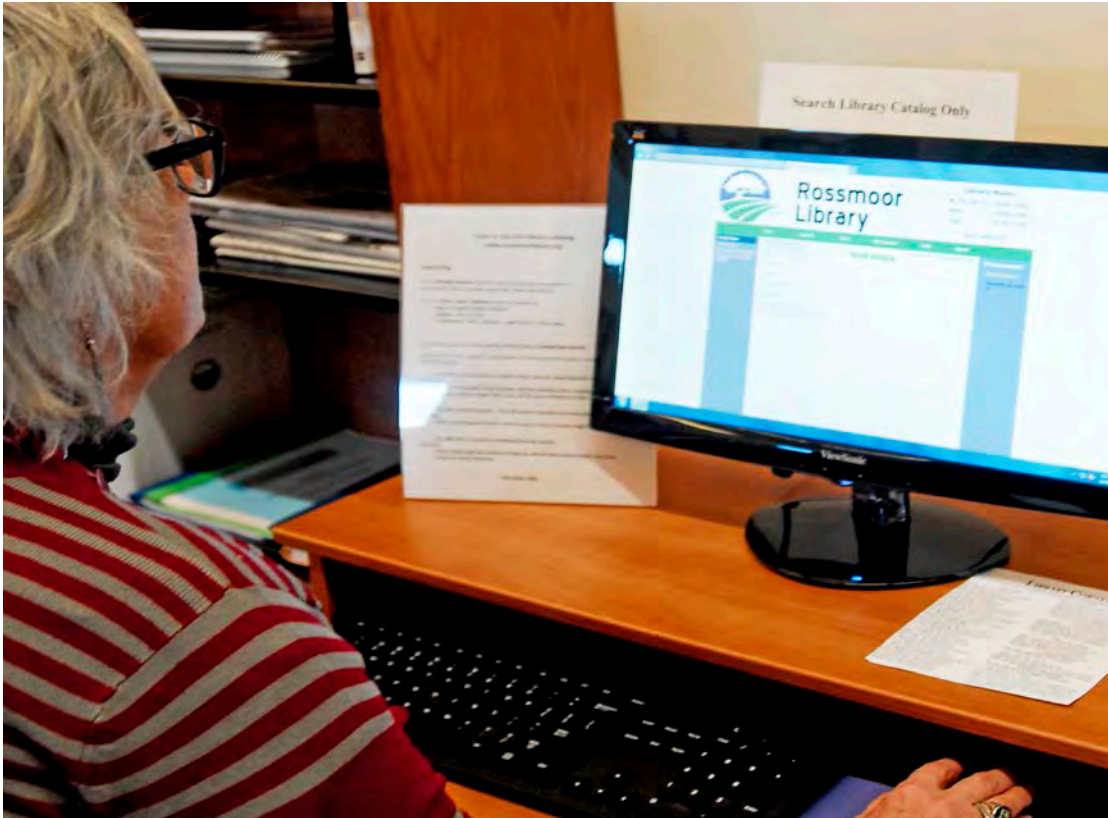
**Policies**

Policy SRP-2.1 Work with local educational institutions and libraries to provide a wide range of educational options that are appropriate to

Rossmoor's population and available at convenient times and locations.

Policy SRP-2.2 Include Rossmoor residents when designing educational programs to ensure that those interested in sharing their experiences and expertise have opportunities to do so.

## 12 COMMUNICATION



### *A. Background*

Communication is the process of conveying and sharing information among GRF, the Mutuals, and all residents. It is most effective when information is clear, accurate, and timely. Rossmoor's technologies allow residents to easily access communications among all community entities in a variety of ways. Communications include marketing, GRF notices, the Rossmoor News, Rossmoor websites, an information telephone service, and the TV channel.

Rossmoor collaborates with the real estate industry to market through the Rossmoor News and a brochure which describes Rossmoor (modified for specific companies), and a promotional video.

The Rossmoor News is published weekly, with 7,500 copies distributed to all residents and some outside subscribers and advertisers. Content is generated by residents, who submit items about club and other activities, by staff reporters, through letters submitted to the Residents' Forum and through news of interest to Rossmoor residents.

The websites include a community website that is updated weekly on which GRF documents are posted (Mutual documents may be posted but are not required). A second website contains a digital copy of the Rossmoor News.

The Rossmoor Information Telephone Service (RITS) is a recording, updated twice weekly, that provides information on events that are happening in the Valley. The service also provides emergency information.

Channel 28 broadcasts 24 hours a day, 7 days a week. Its Bulletin Board broadcasts before and after programs, highlighting events, photos, club and organization meetings, and GRF Board meetings. Most content is filmed and edited by TV channel staff in-house. Channel 28 staff has the ability to do in-studio filming to create original programming such as interviews, exercise programs, features on clubs, drama presentations, lectures, book reviews, informational pieces on topics such as earthquake preparedness, Medicare changes, counseling services and end of life issues, live bingo and much more.

***B. Goals, Policies, and Actions***

<b>Goal COM-1</b>	<b>Clear, effective, and timely lines of communication among GRF Board and Committee members, staff, suppliers of materials and services, residents, Mutuals, potential residents, local and State government agencies, and organizations with which Rossmoor works.</b>
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**Policies**

Policy COM-1.1 Maintain clear and timely lines of communication that flow freely among residents, including GRF employees, Board members,

standing and ad hoc committees, the Mutuals, local and State government, and other pertinent entities.

Policy COM-I.2 Approach communication in a spirit of openness, recognizing that residents have a right to know what is going on and have an opportunity to provide input in decision making. A well informed community benefits everyone.

### **Actions**

Action COM-I.1 Consider evaluating the development of additional methods of communication among GRF, Mutuals, and residents via e-mail, text messages, social media and/or emergency response systems. Develop an e-mail data base from all residents. Make available the referenced systems to the Mutuals in the event they need/want to communicate with residents. Encourage residents to provide emergency telephone information to be used in emergencies for robo calls and text messages. Consider developing a radio dispatch system that can link to CERT information posted on the Rossmoor website to improve the dissemination of emergency preparedness information throughout Rossmoor.

Action COM-I.2 Update the Rossmoor websites (home page and Rossmoor News) daily so that information is current. Assure that web postings of pdf documents are searchable.

Action COM-I.3 Explore giving residents the option of receiving the Rossmoor News online or by home delivery. The Golden Rain Foundation should obtain email addresses from Rossmoor residents in order to make online home delivery of the News possible for those residents who would like it.

Action COM-I.4 Explore the option of access to GRF meetings and live interaction capabilities. Video stream Board meetings so residents can watch in real time and provide on-demand viewing. Consider alternating Board meetings to an afternoon and

evening schedule. Continue posting Board and committees' agenda packages online.

Action COM-I.5 Enhance the marketing of Rossmoor by promoting it as “a community of active senior adults.”

Action COM-I.6 Consider appointing and training residents to serve as tour guides for people interested in buying a residential unit.

Action COM-I.7 Continue to improve marketing of Rossmoor to enhance manor sales and associated Membership Transfer Fee revenue.

## 13 TECHNOLOGY



### *A. Background*

Rossmoor's residents and GRF's staff bring a wide array of expertise on technology to the community. As a larger proportion of Baby Boomers arrive in the community over the next 15 years, residents will place an even higher importance on remaining current with technological innovations. Technologies continue to evolve at a fast pace, and some will quickly become commonplace while others will take longer to be developed and accepted. This chapter describes how Rossmoor can judiciously adopt new technologies that benefit the community and help it to retain the essential qualities that make it unique.

*B. Goals, Policies, and Actions*

<b>Goal TEC-1</b>	<b>Use appropriate, integrated technology that enhances the lives of residents and improves the convenience and efficiency in the provision of GRF services and facilities.</b>
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**Policies**

Policy TEC-1.1 Use appropriate, integrated technology that enhances the lives of residents and improves the convenience and efficiency in the provision of GRF services and facilities.

**Actions**

Action TEC-1.1 Provide resources to keep current with best practices and technology and systems management.

Action TEC-1.2 Periodically review available technology to identify opportunities to apply such technology throughout the GRF, assuring integration among all potential users.

Action TEC-1.3 Stay abreast with new communication and infrastructure technology to enhance convenience and efficiency.

Action TEC-1.4 Conduct on-going evaluation of communication technologies to enhance communication with residents and between all Mutual and GRF Boards and management staff in Rossmoor as appropriate.

Action TEC-1.5 Consider a comprehensive, secure, reliable, and scalable wireless network to provide video, voice, and data transmission links to support GRF's governance, administrative, and security functions.

Action TEC-1.6 Consider establishing a qualified resident technology committee to advise the GRF Board on innovative issues.

<b>Goal TEC-2</b>	<b>A collaborative approach to IT systems and technical solutions to enable coordination among GRF departments and MOD operations.</b>
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**Policies**

Policy TEC-2.1 Maintain a collaborative approach to IT systems and technical solutions to enable coordination among all users.

**Actions**

Action TEC-2.1 Consider implementing a single Rossmoor ID for resident identification, facility access and service provision.

Action TEC-2.2 Consider enabling residents' capacity to perform GRF business online and work toward a cashless (including checks) relationship.

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## 14 GOVERNANCE



### *A. Background*

The Rossmoor community is part of the City of Walnut Creek and subject to City regulations, as well as Contra Costa County and special districts. The City of Walnut Creek has currently designated one council member to liaison with the Rossmoor community.

Rossmoor's internal governance is divided between the GRF and the 18 Mutuals (homeowners' associations or common interest developments), which comprise Rossmoor-Walnut Creek. The Mutuals are individually, and independently responsible for maintenance and management of the 6,678 Manors and the common

properties they occupy. The GRF is the Trustee of the Trust Estate which includes the property and facilities commonly available to all of the 18 Mutuals located in Rossmoor-Walnut Creek. The GRF utilizes the property and facilities included in the Trust Estate to provide recreational services and programs to the residents of the Mutuals qualifying for Membership in the GRF. The 1964 Trust Agreement which created this Trust Estate may expire in 2034, unless it is extended prior to that time, either by amendment, or by the application of the Rule Against Perpetuities language set forth in the Agreement. GRF is not a Common Interest Development as defined in the Davis-Sterling Act and is therefore not generally subject to the Act, except to the extent that it applies to Community Service Organizations, as defined in the Act.

The GRF Board consists of nine members with staggered three year terms, and Board members may be elected up to two times. Board members are elected in nine Districts, comprised of an approximately equal number of manors, with one vote allowed per manor. Voting is completed by mail annually. The ballots are mailed to an auditing firm, which provides official counts. The results are officially announced at the Annual Meeting of Members on the second Monday in May. Candidacy is established through Nominating Petitions. Any member residing within a District may be a nominee and manor owners may sign as many petitions as they so choose so long as they reside in the same district as the nominee.

There are three Standing Committees consisting of Board members, including Mutual Liaison, Policy, and Compensation, and five Standing Resident Advisory Committees consisting of one Board liaison and residents selected by the Board, including Aquatics, Audit, Finance, Fitness, and Golf. Ad-hoc committees, task forces, and CEO advisory groups are established as needed.

GRF meetings are open and are noticed via the Rossmoor News and televised by the TV channel. Annual financial reports are shared with the Mutuals as beneficiaries of the GRF trust. Records requests are honored per Davis-Stirling Act requirements for Inspection of Books and Records.

*B. Goals, Policies, and Actions*

<b>Goal GOV-1</b>	<b>Transparent, representative governance that is responsive to the needs of the Mutuals and Rossmoor residents.</b>
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**Policies**

- Policy GOV-1.1 Maintain and revise, as required, GRF's bylaws, policies, procedures, and rules so that they continue to respond to the needs of Rossmoor residents.
- Policy GOV-1.2 Continue to use a Trust Agreement and supporting policies as a vehicle for cooperative and interdependent GRF and Mutual governance.
- Policy GOV-1.3 Continue to openly gather resident input on large projects before making decisions.

**Actions**

- Action GOV-1.1 Maintain and enhance a simplified document and diagrams explaining the Rossmoor governance structure and use it consistently on the website, in the Rossmoor News, and in GRF materials sent to residents.
- Action GOV-1.2 Establish a procedure for revising the Trust Agreement in advance of expiration on April 19th, 2034.
- Action GOV-1.3 Improve the publicity about the GRF absentee voting options for residents who are not present during a GRF voting period.
- Action GOV-1.4 Continue to use resident audit and finance committees to examine financial performance and internal controls.
- Action GOV-1.5 Continue a review cycle for key operational processes to ensure GRF operations and resident services are relevant, efficient, and cost effective.

**Goal GOV-2 Participation by Rossmoor residents in GRF governance.**

**Policies**

- Policy GOV-2.1 Ensure that residents have appropriate opportunities to provide input in GRF decision-making processes by providing opportunities such as one-on-one meetings with the CEO, Town Hall meetings with a professional moderator, and statistically valid surveys using current technology to gauge resident opinion on key issues.
- Policy GOV-2.2 Encourage residents to participate in Ad Hoc and Resident Advisory Committees and CEO Advisory Groups, particularly when they have interests or expertise relevant to the topic being addressed.

**Actions**

- Action GOV-2.1 Study whether to create a formal grievance procedure for residents with concerns related to GRF functions.
- Action GOV-2.2 Expand the training and orientation program for GRF Board members and others in GRF leadership positions. (Completed 2011)
- Action GOV-2.3 Consider use of technology and alternative formats for GRF meetings with the objective to increase resident participation.

## 15 HOUSING AND MUTUALS



### *A. Background*

Housing in Rossmoor is provided by the Mutuals. All Rossmoor manor owners are members of a Mutual and the GRF. Sales of individual manors to non-GRF members contribute to the Trust Fund through the Membership Transfer Fee, so that Mutuals and GRF have a joint interest in encouraging manor sales.

Rossmoor's residential areas consist of Mutuals, which interact with GRF primarily through the Mutual Operations Division (MOD) of GRF. Mutuals can choose whether to employ MOD to provide property management and related services

and the level of service for which they are willing to pay. They can also choose to use other service providers.

Rossmoor's housing is comprised of:

- ◆ 3,654 co-ops
- ◆ 2,661 condominiums
- ◆ 300 Waterford units (a type of congregate living condominium unit)
- ◆ 63 single-family homes

Currently, no additional housing development is planned for the community and there is limited land available for development. However, some existing buildings could be replaced to increase the number of housing units. This would require the approval of the City of Walnut Creek, and potential modifications to the Walnut Creek General Plan or Zoning Ordinance. It would also require environmental review per State law.

Structures built early in Rossmoor's development, starting in 1963, can be maintained to prolong useful life. Landscaping and building exteriors need to be updated periodically, earthquake retrofits may be needed for some structure types, and fire safety is an important issue that arises regularly.

The Mutual Operations Division (MOD) of GRF provides services to the GRF Trust and to all Mutuals at a level of service selected by each Mutual choosing to purchase service. These services include maintenance, budget preparation, financial management involving advising on maintenance of reasonable services, administrative support for Mutual boards, manor records, a master insurance policy, advice on appropriate insurance, and a deductible sharing agreement.

Other GRF functions interact with Mutuals through materials made available to the Mutuals. These include a Mutual Directors' orientation manual and a GRF Mutual Liaison committee. Office space and administrative support is also provided for Mutual boards. Counseling Services works with individuals and groups to resolve differences, including between neighbors and with Mutual boards. In addition, GRF rules, regulations, and procedures related to access and manor occupancy affect Mutuals.

*B. Goals, Policies, and Actions*

<b>Goal HMU-1</b>	<b>A productive working relationship between GRF and all Mutuals in Rossmoor.</b>
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Policies

- Policy HMU-1.1 Recognize and respect the independence of the Mutuals in their role within the community.
- Policy HMU-1.2 Provide maintenance, financial, and other services to Mutuals that choose to purchase them through the GRF Mutual Operations Division.
- Policy HMU-1.3 Collaborate with Mutuals on purchase of insurance and other operational items where joint action saves money for both GRF and Mutuals.
- Policy HMU-1.4 Review policies and procedures related to Mutuals to seek common agreement on any that may jointly affect the Mutuals and GRF.
- Policy HMU-1.5 Provide counseling and other services in the community to assist Mutuals with resolving personal and interpersonal issues that affect residents.
- Policy HMU-1.6 Encourage Mutuals to publicize the cost of water to their residents, and encourage their residents to conserve water.

<b>Goal HMU-2</b>	<b>Homes that are well-maintained, safe, and retain their value.</b>
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Policies

- Policy HMU-2.1 Collaborate with Mutuals in areas where there is efficiency in combined outreach to residents (information through Rossmoor

News and the TV channel), operations (MOD, handyman program), or other community-wide efforts (bulk insurance).

Policy HMU-2.2 Support Mutuals seeking to reconfigure for enhanced management and governance.

Policy HMU-2.3 Collaborate with Mutuals to ensure housing is maintained, repaired, and updated when indicated. Facilitate the application and approval process for interior remodeling of manors.

Policy HMU-2.4 Collaborate with Mutuals on safety programs of common interest, such as fire and earthquake safety.

Policy HMU-2.5 Coordinate GRF landscaping and other exterior design programs with Mutuals to ensure continuity between GRF and adjoining Mutuals, while encouraging variety and interest throughout the valley.

Policy HMU-2.6 Work with Mutuals to upgrade utility connections for Mutual-managed buildings in conjunction with remodels of facilities.

Policy HMU-2.7 Work with the Mutuals to enhance fire safety measures such as alarms, sprinklers, fire stops, and extinguishers.

Policy HMU-2.8 Work with the Mutuals to identify structures that may need earthquake retrofits, and devise an approach to undertake those retrofits in a systematic way.

Policy HMU-2.9 Work with the Mutuals, especially those containing co-ops, to enable residents with financial needs to devise mechanisms whereby those residents may access equity via reverse mortgages or other financial instruments.

*Editor's Note: Previous rulings by FHA/HUD limiting the insurability of reverse mortgages when a membership transfer fee is required to be paid were addressed by the passage of HR3700 the "Housing Opportunity Through Modernization Act of 2016," primarily due to the lobbying of national organizations. In all other respects, HMU-*

*2.9 relates to limitations imposed on borrowing by regulatory authorities, largely based on factors inherent in each individual Mutual. Such factors are beyond the control of GRF and require the involvement of counsel for the applicable Mutual.*

<b>Goal HMU-3</b>	<b>Thoughtful review of potential new housing development.</b>
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**Policies**

- Policy HMU-3.1 If additional new housing is desired within Rossmoor, work with the Mutuals and the City of Walnut Creek to study this possibility.
- Policy HMU-3.2 If additional new housing is studied, consider impacts on the environment, services, facilities, and other important aspects of the Rossmoor community.

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## 16 IMPLEMENTATION



### *A. Background*

The Ad Hoc Long Range Planning Task Force (Task Force) was created by the Golden Rain Foundation (GRF) Board of Directors on February 26, 2009 and held its first meeting on March 18, 2009. The Task Force conducted approximately 50 meetings over 20 months. Residents participated in focus groups, Town Hall meetings, Task Force meetings, and communicated with the Task Force via email, hard copy, and speaking at Residents Forums. The GRF allocated funds from the operations budgets of 2009 and 2010 to support the Work Plan of the Task Force. These funds enabled GRF to hire independent consultant firms to develop and conduct a survey of residents via telephone, internet, and hard copy, and to hire a facilitator/planning firm.

The General Plan was initially prepared and proposed by the Task Force. In April 2011, it was reviewed, amended and adopted in final form by the GRF Board of Directors as the General Plan for Rossmoor. On April 30, 2015, the GRF Board

approved the appointment of members to the Ad Hoc Task Force to Review the General Plan (Review Task Force). The Review Task Force conducted a series of meetings over a six month period beginning in June 2015. These meetings were open to residents who had the opportunity to speak through a Residents' Forum as well as to submit input to the Review Task Force in person, via e-mail, telephone or letter. The Review Task Force gathered background information through written materials and meetings with GRF staff and various resident groups and organizations. The Review Task Force presented its recommendations to the GRF Board on January 28, 2016. The GRF Board reviewed and discussed the recommendations during meetings held on June 14, July 12, and August 9, 2016. The General Plan, as amended, was approved by the GRF Board on October 27, 2016.

Because so much time and money was invested in producing the original Plan, the implementation of the Plan should be carried out in a timely and organized manner.

A revised and updated matrix listing the goals, policies, and actions in this Plan concludes this chapter. A primary responsible party, often additional responsible parties, and a timeframe are listed for each policy and action. While the responsible parties are often GRF staff, it is the GRF Board that ultimately governs the implementation of the recommendations. Staff carries out the directions of the GRF Board. In 2011, the GRF staff assignments were made by the CEO and the suggested timeframes are the combined work of the CEO and the Task Force. Finally, some goals, policies, and actions are preceded by an asterisk (\*), indicating that they are priority recommendations associated with the major conclusions and recommendations found in Chapter 3 of this Plan.

*B. Goals, Policies, and Actions*

<b>Goal IMP-1</b>	<b>A GRF that responds to current conditions and looks ahead to anticipate Rossmoor's future needs.</b>
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### **Policies**

Policy IMP-1.1 Review the General Plan and other GRF governing policy documents periodically to ensure they reflect community priorities.

### **Actions**

Action IMP-1.1 Require staff to review the implementation of the General Plan annually and report to the GRF Board in June of each year starting in 2012.

Action IMP-1.2 Assemble an Ad Hoc Task Force in the years 2015 and 2020 to formally reassess and update the Plan.

Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
<b>ENVIRONMENT AND SUSTAINABILITY</b>				
<b>Goal ENV-1: Conservation of energy and non-renewable resources within Rossmoor.</b>				
Policy ENV-1.1	Review programs and funding options on an on-going basis to find feasible approaches to energy and water conservation, plus renewable energy.	Mutual/Trust Operations Staff		Ongoing
Policy ENV-1.2	Meet State energy efficiency standards.	Staff	GRF Project Manager	Ongoing
Policy ENV-1.3	New construction remodels, and landscaping projects should minimize heat island effects and runoff, plus maximize irrigation and rainwater infiltration.	Staff	GRF Project Manager	Ongoing
Policy ENV-1.4	Evaluate siting of new buildings to determine if active or passive solar heating and cooling opportunities exist and if so whether to build them in initially or simply design new buildings to anticipate future potential alternative energy systems, such as solar panels.	Staff	GRF Project Manager	Ongoing
Policy ENV-1.5	Consider Leadership in Energy and Environmental Design (LEED® <a href="http://www.lead.usgbc.org">www.lead.usgbc.org</a> ) standards for new construction, and take costs for certification under consideration.	Staff	GRF Project Manager	Ongoing
Policy ENV-1.6	When purchasing fleet vehicles, consider the lowest-polluting and most energy-efficient vehicles under the funding programs.	Fleet Manager		
Policy ENV-1.7	Publicize energy-saving ideas, including the 'Hot Day Program', through all available community media, including the Rossmoor News, website, television and similar community-wide outreach.	Director of Communications		Ongoing

\* = Major conclusions and recommendations

CEO = Chief Executive Officer; CFO = Chief Financial Officer; HR = Human Resources

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<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Policy ENV-1.8	Support Rossmoor-wide, mutual and individual funded solar power and water heating, water conservation or re-use (such as grey water) programs. Support other such initiatives as a way to enhance Rossmoor's stewardship of our resources, Rossmoor's place as a leader in energy conservation and environmental sustainability, as well as cost effective, community management.	GRF/Mutual Liaison Committee	MOD Project Manager	Ongoing
Action ENV-1.1	Consider implementing the recommendations of energy alternative and sustainability organizations and committees on an on-going basis, as funds are available.	Mutual/Trust Operations Staff	GRF/MOD Project Manager	5+
Action ENV-1.2	Incorporate energy, water and resource conservation into administrative policy to ensure that conservation is part of every employee's job.	GRF CEO	HR Senior Manager	1
Action ENV-1.3	Establish energy-saving policies for GRF fleet vehicles; including reducing idling times, reviewing routes for efficiency, and utilizing all cost-effective fuel energy sources, when available.	GRF CEO	Fleet Manager	2
Action ENV-1.4	Study retrofitting lighting to LED.	Mutual/Trust Operations Staff	GRF Board Mutuals	2-3
<b>Goal ENV-2: Minimal use of toxic materials throughout the community.</b>				
Policy ENV-2.1	Use low- or no-toxic building materials and integrated pest management when feasible.	Mutual/Trust/Golf Operations Staff	Project Manager	Ongoing
Policy ENV-2.2	Use organic or non-toxic housekeeping products at all GRF locations when feasible.	Director of Resident Services	Custodial Supervisor	2
Policy ENV-2.3	Consider conversion to air drying machines after hand-washing in public bathrooms, instead of paper towels, reducing paper use and maintenance.	Mutual/Trust Operations Staff		Ongoing

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Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
<b>Goal ENV-3: Water conservation throughout the community.</b>				
*Policy ENV-3.1	Seek to reduce water demand for landscaping, including implementing landscaping and irrigation standards and restrictions developed by the state, City of Walnut Creek and East Bay Municipal Utility District.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing
Policy ENV-3.2	Publicize and encourage water-saving ideas through the all available Rossmoor media, including the Rossmoor News and similar community-wide outreach.	Director of Communications		Ongoing
Action ENV-3.1	Explore additional opportunities for use or re-use of non-potable water for landscape irrigation and groundwater recharging.	Landscape Manager Golf Superintendent		3-5
*Action ENV-3.2	Maintain and review efficient irrigation use and water use reduction, using technology as well as visual monitoring.	Landscape Manager Golf Superintendent		Ongoing
*Action ENV-3.3	Evaluate new advances in drip irrigation and other water saving practices and devices for retrofit and new landscape.	Landscape Manager Golf Superintendent		Ongoing
Action ENV-3.4	Consider separation of potable and non-potable water lines in remodel and new construction.	Director of Mutual/Trust Operations		Ongoing
*Action ENV-3.5	Prioritize onsite water retention and water table recharging through bio-swales and other practices.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing
<b>Goal ENV-4: Protection of biological resources in Rossmoor.</b>				
Policy ENV-4.1	Educate residents and employees about landscaping that provides habitat for sensitive species found in Rossmoor. When possible, use that type of landscape material, while discouraging invasive and nuisance species.	Landscape Manager		2
*Action ENV-4.1	Identify key habitat areas and ensure that hiking and other outdoor recreational activities are sensitive to species found in them.	Director of Mutual/Trust Operations	Landscape Manager	3-5
Action ENV-4.2	Continue to identify heritage trees located in Rossmoor and protect them per the Walnut Creek Tree Preservation Ordinance.	Director of Mutual/Trust Operations	Landscape Manager Golf Superintendent	Ongoing

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<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Action ENV-4.3	Review landscape chemicals for negative impact.	Landscape Manager Golf Superintendent		Ongoing
Action ENV-4.4	Minimize light pollution where appropriate.	Director of Mutual/Trust Operations		Ongoing
<b>Goal ENV-5. Balance between the enjoyment, the practicality, and the health issues of living with wildlife.</b>				
Policy ENV-5.1	Balance the enjoyment of living with wildlife with the practicality of dealing with the overpopulation of some species and the health issues that these species create.	Director of Mutual/Trust Operations	Landscape Manager Golf Superintendent	Ongoing
Policy ENV-5.2	Educate residents about the impacts of feeding and watering wildlife, especially through outside pet feeders.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing
Policy ENV-5.3	Recognize the overpopulation of Canada geese and turkeys in the community, and consider ways to reduce their presence.	Director of Mutual/Trust Operations Director of Golf	Landscape Manager Golf Superintendent	Ongoing
Action ENV-5.1	Manage goose, turkey and deer populations to address safety, health and cleanliness issues related to their population.	Director of Mutual/Trust Operations Director of Golf	Landscape Manager Golf Superintendent	Ongoing
<b>Goal ENV-6: Reduced waste generation in Rossmoor through creative solutions to waste management.</b>				
Policy ENV-6.1	Purchase and use recycled materials whenever feasible.	Director of Mutual/Trust Operations Director of Golf	GRF Staff	Ongoing
Policy ENV-6.2	Expand the range of materials recycled at Rossmoor as new recycling programs become available.	Director of Mutual/Trust Operations	GRF Staff	I

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<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Policy ENV-6.3	Expand recycling programs in GRF buildings, with a focus on educating residents and employees on its benefits, and provide clear information about recycling options. Include the Activities Council in this effort, with a focus on reducing the use of non-renewable materials and resources associated with club and GRF events.	Director of Mutual/Trust Operations Director of Resident Services	Custodial/Recreation Supervisors	1
Policy ENV-6.4	Reduce green waste.	Mutual/Trust/Golf Operations Staff	Landscape Manager Golf Superintendent	Ongoing
Action ENV-6.1	Expand hazardous waste collection options and disseminate collection information regularly through all available Rossmoor media.	Director of Mutual/Trust Operations	Director of Communications	2
Action ENV-6.2	Prioritize reusing or recycling green waste within Rossmoor, as feasible.	Mutual/Trust/Golf Operations Staff	Landscape Manger Golf Superintendent	Ongoing
Action ENV-6.3	Evaluate opportunities to market green waste.	Director of Trust/Mutual Operations	Landscape Manager	2
Action ENV-6.4	Develop a program with an outside agency to accept recycled appliances and household goods.	CEO	Director of Trust/Mutual Operations	1
Action ENV-6.5	Review current landscape practices to minimize green waste and maximize use of beneficial landscape debris and mulch.	Director of Mutual/Trust Operations Director of Golf	Landscape Manager Golf Superintendent	Ongoing
<b>OPEN SPACE AND LANDSCAPING</b>				
<b>Goal OSL-1: Preserve open space areas that buffer Rossmoor from surrounding development.</b>				
Policy OSL-1.1	Protect the hill slopes and ridgelines surrounding Rossmoor's developed area through efforts such as working with surrounding open space property owners, including the East Bay Regional Park District and East Bay Municipal Utility District, to support attractive and continued open space uses of these properties.	CEO	Landscape Manager	Ongoing

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<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Policy OSL-1.2	Look for opportunities to acquire adjacent property or excess Mutual land.	CEO		Ongoing
<b>Goal OSL-2: Preserve open space areas that provide opportunities for active and passive enjoyment.</b>				
Policy OSL-2.1	Enhance views of Rossmoor's open space areas.	CEO	Director of Mutual/Trust Operations Landscape Manager	Ongoing
*Policy OSL-2.2	Support the Trails Club's efforts to provide a seamless connection to Rossmoor roads/sidewalks, mapping, signage, appropriate expansion, and maintenance of trails within Rossmoor's open space areas.	Director of Mutual/Trust Operations	Landscape Manager	2
Policy OSL-2.3	Ensure that new uses of GRF's open space do not detract from the overall attractiveness of the open space area.	CEO	Director of Mutual/Trust Operations Director of Resident Services	Ongoing
<b>Goal OSL-3: Maintain open space areas.</b>				
Policy OSL-3.1	Maintain drainage within GRF's open space to reduce the risk of landslides and subsidence in hillside areas.	Director of Mutual/Trust Operations		Ongoing
Policy OSL-3.2	Maintain fencing within GRF's open space to reduce the risk of unauthorized access.	Director of Mutual/Trust Operations	Public Safety Manager	Ongoing
*Policy OSL-3.3	Work with the Contra Costa County Fire Department and the Mutuals to minimize fuel load, maintain fire breaks, and establish defensible space to comply with Contra Costa County requirements.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing
Action OSL-3.1	Study Tice Creek throughout Rossmoor to determine whether additional measures to reduce erosion are necessary.	Director of Mutual/Trust Operations Director of Golf	Landscape Manager Golf Superintendent	3-5
Action OSL-3.2	Be open to the potential for conservation easements to be sold as mitigation.	GRF Board	CEO	5+
Action OSL-3.3	Identify open space areas that could be developed if needed.	CEO		2

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Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
<b>Goal OSL-4: Prioritize landscaping throughout Rossmoor that provides natural beauty and is both durable and environmentally-friendly.</b>				
Policy OSL-4.1	Provide attractive, sustainable, and colorful landscaping for Trust facilities and properties.	Director of Mutual/Trust Operations	Landscape Manager Golf Superintendent	Ongoing
*Action OSL-4.1	Update GRF landscaping, by reducing lawns, and refurbishing landscape areas, trees and irrigation systems, with consideration of transitioning to more drought-tolerant, deer and turkey resistant plants, native plants and water conserving irrigation.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing
<b>FINANCE</b>				
<b>*Goal FIN-1: A fiscally healthy GRF that plans for the future and responds to the needs and desires of Rossmoor residents, consistent with Rossmoor's standing as a premier adult community, including keeping the Coupon as low as reasonably possible.</b>				
*Policy FIN-1.1	Balance the expenditure of capital and/or operating cost against the available funding, the cost effectiveness of the expenditure, the expected results in terms of meeting the needs and desires of residents, the projected usage, and the timing involved in fulfilling the recommendation.	GRF Board Finance Committee	CFO-CEO	Ongoing
*Policy FIN-1.2	Keep the GRF portion of the Coupon as low as possible while providing a range of programs, services, and facilities. Balance the needs and desires for expansion and modification with their impact on the Coupon.	GRF Board Finance Committee	CFO-CEO	Ongoing
Policy FIN-1.3	Use the GRF budgeting process to review ongoing expenditures and one-time capital expenditures and to review specific needs and desires for new or improved facilities.	GRF Board Finance Committee	CFO-CEO	Ongoing
Policy FIN-1.4	Ensure that expenditures, including those recommended by actions within this Plan, are as cost effective as possible while also meeting the needs and desires of Rossmoor residents.	GRF Board Finance Committee	CFO-CEO	Ongoing

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<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Policy FIN-1.5	Undertake capital projects to the extent that they can be funded with available Trust funds or loans whose repayment through Trust funds can be projected using fiscally sound budget principles. Consider cost of maintenance and upgrades when evaluating cost of new facilities.	GRF Board Finance Committee	CFO-CEO	Ongoing
*Policy FIN-1.6	Review the impact of ongoing operating costs for new facilities on GRF's operating budget and Coupon charges when deciding whether to develop such facilities.	GRF Board Finance Committee	CFO-CEO	Ongoing
Policy FIN-1.7	Periodically review programs and services to ensure they are providing cost effective, quality services and resulting in desired outcomes.	GRF Board Finance Committee	CFO-CEO	Ongoing
*Policy FIN-1.8	Review obligations to employee salary and benefit programs, as well as the impact of these programs on the GRF portion of the Coupon and on recruitment and retention of employees.	GRF Board Compensation Committee	CFO-CEO HR Senior Manager	Ongoing
Action FIN-1.1	Periodically analyze the direct cost of GRF services provided by staff to determine whether they are cost effective. The analysis should include a comparison of the cost of outsourced services without sacrificing quality or other aspects of the services important to Rossmoor residents.	GRF Board Finance Committee	CFO-CEO	3-5
Action FIN-1.2	Consider the impact on the Long Range Capital Project Plan for all major spending decisions.	GRF Board Finance Committee	CFO-CEO	Ongoing
Action FIN-1.3	Maintain an operating reserve to address future needs and to help prevent significant fluctuations in future budgets.	GRF Board Finance Committee	CFO-CEO	Ongoing
<b>Goal FIN-2: An organizational culture that continually seeks entrepreneurial opportunities and expanded revenues consistent with the needs and expectations of Rossmoor residents.</b>				
*Policy FIN-2.1	Develop programs to enhance "outside" revenue from GRF facilities and services utilizing existing activities and expertise. Focus additional revenue on the provision of services to residents with minimal increase of the GRF portion of the Coupon or other fees to residents.	GRF Board Finance Committee	CFO-CEO	Ongoing

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*Policy FIN-2.2	Encourage both private and GRF run commercial activities in GRF's facilities, consistent with Rossmoor's values and with an emphasis on filling the needs of Rossmoor residents and attracting Rossmoor residents as patrons.	GRF Board Finance Committee	CEO	5+
*Action FIN-2.1	Review ideas for revenue enhancement to determine which should be implemented consistent with GRF policies.	GRF Board Finance Committee	CFO-CEO	Ongoing
<b>Goal FIN-3: GRF recognizes the need for, and the value of, a strong system of internal control and transparency.</b>				
Policy FIN-3.1	Ensure effective and efficient internal controls are in place to achieve GRF objectives in operations, financial reporting and compliance with applicable laws and regulations.	CFO-CEO	Finance Staff	Ongoing
Action FIN-3.1	Engage a qualified audit firm to conduct an annual audit using generally accepted audit standards.	Audit Committee	CFO	Ongoing
Action FIN-3.2	Consider posting on Rossmoor website the GRF and related entities' monthly financial statements and Finance Committee agenda packages.	CFO	Director of Communications Executive Services Sr. Manager	Ongoing
Action FIN-3.3	Consider posting link on Rossmoor website to public information filings.	Audit Committee	CFO-CEO  Director of Communications	1-2
<b>FACILITIES</b>				
<b>Goal FAC-1: Modern facilities that meet the needs of Rossmoor residents.</b>				
Policy FAC-1.1	Maintain and enhance all GRF clubhouse facilities and grounds as appropriate to the social, intellectual, cultural, spiritual, and recreational needs and desires of residents.	Director of Resident Services	Custodial Supervisor/ Trust Maintenance Staff	Ongoing
*Policy FAC-1.2	Maintain and enhance the parks and golf courses for recreation and as open area focal points.	Landscape Manager Golf Superintendent		Ongoing

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*Policy FAC-1.3	Continually refer to a Facilities Master Plan when considering usage, accessibility, storage, food service, etc., to meet the needs and desires of a) residents, b) clubs and organizations, c) committees, and d) GRF sponsored events. See Appendix H for suggestions.	CEO	Consultant	3-5
Policy FAC-1.4	Consider adopting additional maintenance practices for GRF facilities which include "green" concepts and energy and water conservation programs.	Director of Resident Services Director of Mutual/Trust Operations	Project Manager	Ongoing
*Policy FAC-1.5	Provide access and usage of GRF facilities/properties to all residents, regardless of disabilities, whenever economically feasible or legally required.	Director of Resident Services		Ongoing
Policy FAC-1.6	Update interiors of GRF facilities on a routine basis to ensure high quality.	Director of Resident Services		Ongoing
Policy FAC-1.7	Provide on-site food service at appropriate GRF facilities.	Director of Resident Services		Ongoing
Policy FAC-1.8	Consider the use and/or purchase of the former Del Valle High School facilities.	CEO		Ongoing
Policy FAC-1.9	Review the status and priority of proposed major capital facilities projects annually.	CEO	Director of Resident Services	Ongoing
*Action FAC-1.1	Explore expanding commercial services consistent with Rossmoor's core values as expressed in the Mission Statement using GRF land and buildings that can be made available to meet residents' needs.	CEO	Director of Resident Services	5+
*Action FAC-1.2	Renovate the Del Valle Clubhouse to accommodate an expanded and enhanced Fitness Center, meeting spaces, and other facilities, as recommended by the Residents' Task Force in 2014, and other studies.	GRF Board	CEO	1
*Action FAC-1.3	Consider ideas and suggestions offered by organized groups (see Appendix G) in a coordinated manner as usage, funding, and competing desires warrant.	GRF Board	CEO	Ongoing

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Action FAC-1.4	Explore additional parking at GRF facilities as needed.	Director of Resident Services Director of Mutual/Trust Operations	Project Manager	3-5
*Action FAC-1.5	Continue to develop a Facilities Master Plan and update annually, and use it as a planning tool for budgeting and project development.	CEO	Director of Resident Services	Ongoing
*Action FAC-1.6	Study the rehabilitation of the Hillside and Dollar Clubhouses.	GRF Board CEO	Director of Resident Services	3-5
*Action FAC-1.7	Consider upgrading the Gateway multi-purpose rooms, and arts and crafts rooms.	GRF Board CEO	Director of Resident Services	1-3
<b>Goal FAC-2: A balance between the competing demands for facility use.</b>				
Policy FAC-2.1	Maintain and enforce rules and policies that allow for fair and orderly use of GRF facilities by Rossmoor residents and clubs.	Policy Committee	Staff	Ongoing
Policy FAC-2.2	Permit renters, guests and other non-residents to use GRF facilities when appropriate and feasible, charging guest fees for use, where feasible, to ensure that they generate revenue for the community and that non-resident use does not negatively impact the availability or quality of facilities for residents.	GRF Board	Policy Committee	Ongoing
Policy FAC-2.3	Where possible, specialized GRF facilities used by clubs should be managed by those clubs.	Policy Committee	Director of Resident Services	Ongoing
Policy FAC-2.4	Use coordinated, efficient technology to obtain GRF facility access and usage data and to enable appointments and reservations for facilities and events.	CFO	Information Systems Manager	3-5
Action FAC-2.1	Continue to develop a means by which residents' needs and interests can be reviewed and considered. See 2010 Appendix I.	CEO		Ongoing
Action FAC-2.2	Continue to develop amenities and activities to keep pace with demands.	Director of Resident Services	Recreation Staff	Ongoing

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Action FAC-2.3	Make available to residents a summary of GRF Board's review of future facilities projects.	CEO	Executive Services Sr. Manager	Ongoing
<b>Goal FAC-3: Utilities that provide adequate capacity to meet Rossmoor's needs.</b>				
Policy FAC-3.1	Ensure that water, gas, electric, communication, and sewer services are available and upgraded as needed.	Director of Mutual/Trust Operations		Ongoing
Action FAC-3.1	Consider installing solar equipment to reduce utility costs.	GRF Board	Director of Mutual/Trust Operations	1
Action FAC-3.2	Consider modernizing rest room facilities to meet water conservation recommendations.	Director of Mutual/Trust Operations	Director of Golf	1-2
Action FAC-3.3	Consider exploring the feasibility of a water reclamation facility.	GRF Board	CEO Director of Mutual/Trust Operations	
<b>TRANSPORTATION</b>				
<b>Goal TRA-1: A safe and user-friendly roadway system that provides for vehicle travel in Rossmoor and connects to outside roadways.</b>				
Policy TRA-1.1	Maintain Rossmoor's existing private roadway network in good physical condition.	Director of Mutual/Trust Operations		Ongoing
Policy TRA-1.2	Actively engage City, County and other government agencies to maintain public ingress and egress routes as well as emergency access roads in good physical condition.	CEO	Public Safety Manager	Ongoing
Policy TRA-1.3	Expand safety on Rossmoor's roadways through the implementation of structural and non-structural measures such as encouraging driver training, providing safety information, and installing current traffic control techniques.	Public Safety Manager	Public Safety Manager Director of Mutual/Trust Operations	Ongoing
*Policy TRA-1.4	Evaluate and expand available transportation mobility options for Rossmoor residents, including options such as electric cars, bicycles, golf-carts, car-pooling, car-sharing, shuttle services, and new transportation technologies.	Director of Resident Services	Public Safety Manager	Ongoing

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Policy TRA-1.5	Encourage use of energy efficient transportation. Prioritize "low hanging fruit" solutions for problem intersections that will provide immediate and low cost improvement.	Director of Mutual/Trust Operations Public Safety Manager	Director of Resident Services	Ongoing
Policy TRA-1.6	Enforce the California Vehicle Code and Walnut Creek Municipal Code on Rossmoor's streets through the City of Walnut Creek.	Public Safety Manager		Ongoing
Policy TRA-1.7	Evaluate outsourcing as an option to provide all or part of the transportation services.	GRF Board	Director of Resident Services	1-2
Action TRA-1.1	Identify and improve roadways to enhance safety, including restriping lanes, stop signs, and other signage and mirrors to expand visibility	Public Safety Manager	Director of Mutual/Trust Operations	2
Action TRA-1.2	Study existing GRF parking lots, including counting parking usage, to determine if and where additional handicapped and golf-cart parking spaces should be located. As a part of this study, evaluate whether the parking lots will provide sufficient parking in the long-term and where additional parking may be needed.	Public Safety Manager Director of Resident Services	Project Manager Director of Mutual/Trust Operations	3-5
Action TRA-1.3	Continue to encourage safe driving on Rossmoor's roads. This program should encourage drivers in Rossmoor to participate in driver education programs and to drive only if they are safe drivers.	Public Safety Manager		Ongoing
Action TRA-1.4	Develop a program to improve traffic safety and reduce accident rates.	Public Safety Manager		Ongoing
Action TRA-1.5	Study the provision of new or improved facilities, including dedicated golf car/bicycle lanes, for golf-car circulation either on or parallel to the Valley's major streets.	Public Safety Manager		5+
Action TRA-1.6	Evaluate the need, feasibility and cost/benefit for electric vehicle charging stations at Rossmoor's public facilities.	CEO	Director of Resident Services	Ongoing
Action TRA-1.7	Continue to partner with Walnut Creek Police Department to maintain a visible, traffic enforcement presence.	Public Safety Manager	CEO	Ongoing

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Action TRA-1.8	Identify, prioritize and implement improvements at problem intersections that will provide immediate, relatively low cost improvements to Rossmoor's safe environment for drivers and pedestrians.	Public Safety Manager	Director of Mutual/Trust Operations	1-2
Action TRA-1.9	Evaluate outsourcing as an option to provide all or part of the transportation services.	Director of Resident Services		5+
<b>Goal TRA-2: A transit system that provides access for Rossmoor residents within Rossmoor and connections to key outside destinations.</b>				
*Policy TRA-2.1	Provide transportation within Rossmoor and that connects to key locations outside of Rossmoor such as BART, Downtown Walnut Creek, and shopping areas.	Director of Resident Services		Ongoing
Policy TRA-2.2	Provide 'Travel Training' for first-time bus users and other outreach to familiarize residents with the bus system.	Director of Resident Services	Travel Coordinator	Ongoing
*Action TRA-2.1	Regularly analyze the bus system in order to maximize its efficiency, cost-effectiveness, and usefulness to residents. (Last studied in 1995)	Director of Resident Services		2
Action TRA-2.2	Publicize 'Travel Training' through all available media within Rossmoor to entice maximum ridership.	Director of Resident Services	Director of Communications	Ongoing
Action TRA-2.3	Consider tracking devices for GRF buses to enhance effectiveness.	Director of Resident Services	Fleet Manager	5+
<b>Goal TRA-3: Appropriate transportation facilities for pedestrians, cyclists, and disabled persons.</b>				
Policy TRA-3.1	Provide and maintain sidewalks and pedestrian paths throughout Rossmoor focusing on pedestrian safety.	Director of Mutual/Trust Operations	Public Safety Manager	Ongoing
Policy TRA-3.2	All new construction or major building renovations shall meet ADA requirements and utilize techniques to ensure access for persons with disabilities.	Director of Mutual/Trust Operations	Director of Resident Services	Ongoing
Action TRA-3.1	Evaluate existing roadways and intersections to determine where they could be modified for pedestrian safety and comfort.	Public Safety Manager	Director of Mutual/Trust Operations	Ongoing
Action TRA-3.2	Evaluate connections between existing open space trails and residential areas, sidewalks, and community facilities.	Director of Resident Services	Public Works Administrator	5+

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<b>SECURITY</b>				
<b>Goal SEC-1: A safe and secure community.</b>				
*Policy SEC-1.1	Balance 24-hour security with convenient access and privacy for residents.	Policy Committee	Public Safety Manager	Ongoing
Policy SEC-1.2	Strive to ensure that Rossmoor receives an adequate share of police and traffic safety patrols from the City of Walnut Creek.	Public Safety Manager		Ongoing
*Policy SEC-1.3	Use monitoring devices capable of storing images for later and/or real time closed circuit monitoring to provide enhanced security as appropriate.	GRF Board	Policy Committee Public Safety Manager	3-5
*Policy SEC-1.4	Analyze data about security incidents on an on-going basis: then adjust Public Safety responses and crime prevention education based on the types of incidents that occur.	Public Safety Manager		Ongoing
*Action SEC-1.1	Study ways to upgrade entry gate security technology, including vehicle, delivery, bicycle, and walk-in traffic. During this process, review how service providers and guests are given access to the community and consider ways in which greater security could be provided without resulting in undue difficulty of access.	Public Safety Manager		1
Action SEC-1.2	Investigate development of a second entry/exit for resident use. Completed and deemed not feasible.	Director of Mutual/Trust Operations		
Action SEC-1.3	Study ways to analyze data about security incidents and adjust Public Safety and Walnut Creek Police Department responses based on the types of incidents that occur.	Public Safety Manager		Ongoing

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<b>Goal SEC-2: An ability to respond to emergencies and disasters.</b>				
Policy SEC-2.1	Maintain the capacity for GRF to provide first-response to emergencies.	GRF Board	Public Safety Manager	Ongoing
*Policy SEC-2.2	Coordinate emergency and disaster response efforts with Rossmoor residents and organizations, the City of Walnut Creek, and other emergency responders.	Public Safety Manager		Ongoing
Policy SEC-2.3	Ensure emergency access routes are clear and coordinated with neighboring property owners.	Public Safety Manager		Ongoing
*Policy SEC-2.4	Work with the Mutuals to clear defensible space in areas surrounding Mutual and GRF buildings.	Landscape Manager		Ongoing
*Policy SEC-2.5	Support emergency and disaster preparedness activities, including fire prevention education, earthquake preparedness, personal safety education, and other educational programs tailored to Rossmoor's population.	Public Safety Manager		Ongoing
Policy SEC-2.6	Assure continuity of critical GRF operations during power outages and emergencies.	Director of Mutual/Trust Operations CFO	Public Safety Manager Information Systems Manager	Ongoing
Action SEC-2.1	Study emergency assistance access to allow GRF staff and emergency providers to enter resident manors in case of emergency.	Public Safety Manager		Ongoing
*Action SEC-2.2	Maintain and as necessary update GRF's All Hazards Emergency Operation Plan. The plan describes how GRF will work together with the City, various resident emergency response organizations, and Rossmoor residents in emergency situations.	Public Safety Manager	GRF Board	I
Action SEC-2.3	Sponsor GRF Board of Directors and staff training and drills in Incident Command Structure (ICS) responsibilities.	CEO Public Safety Manager	Senior Management	Ongoing
*Action SEC-2.4	Continue resource support for resident-driven disaster response organizations by providing training resources and procuring necessary equipment and supplies.	Public Safety Manager		Ongoing

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*Action SEC-2.5	Include disaster response communication, training information, access to standard operating procedures and documentation on the existing Rossmoor website.	Public Safety Manager	Director of Communications	2
Action SEC-2.6	Establish an emergency communication system for the residents. Coordinate this communication with First Responders.	Director of Mutual/Trust Operations Public Safety Manager	Information Systems Manager	Done
*Action SEC-2.7	Assess status and anticipate needs to facilitate maintenance of critical GRF operations during emergencies and provide for the continuation of those operations.	Director of Mutual/Trust Operations CFO Public Safety Manager	Senior Management	2
<b>WELLNESS</b>				
<b>Goal WLN-1: An environment that supports residents in maintaining their independence as well as their social, emotional, and physical well-being.</b>				
*Policy WLN-1.1	Coordinate programs and services to facilitate residents in maintaining their health and independence, with special attention to residents who need some assistance to age in place.	Counseling Recreation Public Safety		Ongoing
Policy WLN-1.2	Support the fitness center and other recreational facilities and services that promote an active, healthy lifestyle.	GRF Board	Fitness Staff	Ongoing
Policy WLN-1.3	Support clubs/organizations and counseling services to respond to residents' wellness issues, including social, intellectual, cultural, spiritual, and recreational needs and desires. Examples of activities include social gatherings, physical activities, and short-term financial-aid to needy residents.	Director of Resident Services Counseling Manager	Recreation Supervisor	Ongoing
Policy WLN-1.4	Continue using counseling services to provide referrals for residents who need financial assistance.	Counseling Manager		Ongoing
Action WLN-1.1	Create an ongoing program to publicize information regarding wellness services.	Counseling Manager		Ongoing

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Action WLN-1.2	Consider expanding the counseling services.	GRF Board	Counseling Services	2
Action WLN-1.3	Facilitate resolution of communication issues among residents through the counseling services provided by GRF.	Counseling Manager		Ongoing
<b>SOCIAL AND RECREATIONAL PROGRAMS AND LOCAL AMENITIES</b>				
<b>Goal SRP-1: A wide range of social, cultural, and recreational opportunities appealing to the diversity of Rossmoor residents.</b>				
*Policy SRP-1.1	Balance the provision of social, cultural, and recreational opportunities that serve active residents with opportunities for those who are physically challenged in their ability to participate.	GRF Board	Director of Resident Services	Ongoing
Policy SRP-1.2	Support groups, clubs, and organizations undertaking social, cultural, and recreational activities, including active recreation such as sports, through provision of appropriate space and facilities and administration of insurance.	Director of Resident Services	Recreation Supervisor	Ongoing
Policy SRP-1.3	Encourage volunteerism by identifying and publicizing volunteer opportunities.	Director of Resident Services	Volunteer Coordinator Director of Communications	Ongoing
Policy SRP-1.4	Provide a travel and excursion program on a cost-recovery basis which may expand or contract as usage and interest indicate.	Director of Resident Services	Recreation Supervisor	Ongoing
Policy SRP-1.5	Provide a variety of performances, including movies, live entertainment, readings, and other events of interest to Rossmoor residents.	Director of Resident Services	Recreation Supervisor	Ongoing
Policy SRP-1.6	Provide recreational and social opportunities throughout the week, including evenings and weekends, to ensure that working and non-working residents can enjoy them.	Director of Resident Services	Recreation Supervisor	Ongoing
Action SRP-1.1	Continue providing outdoor activities during the warm months which should be focused on food, enjoyment, and be broadly desirable to all residents.	Director of Resident Services	Recreation Supervisor	2
Action SRP-1.2	Consider expanding movie offerings, in terms of the variety of movies shown and the number of showings of popular features.	Director of Resident Services	Recreation Supervisor	1

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Action SRP-1.3	Continue to work with the Activities Council to assess current locker storage needs for clubs and organizations and assess an annual fee for locker use.	Director of Resident Services	Recreation Supervisor	2
<b>Goal SRP-2: Cultural and educational programs that provide opportunities for life-long enjoyment and learning.</b>				
Policy SRP-2.1	Work with local educational institutions and libraries to provide a wide range of educational options that are appropriate to Rossmoor's population and available at convenient times and locations.	Director of Resident Services	Recreation Supervisor	Ongoing
Policy SRP-2.2	Include Rossmoor residents when designing educational programs to ensure that those interested in sharing their experiences and expertise have opportunities to do so.	Director of Resident Services	Recreation Supervisor	2
<b>COMMUNICATION</b>				
<b>Goal COM-1: Clear, effective, and timely lines of communication among GRF Board and Committee members, staff, suppliers of materials and services, residents, Mutuels, potential residents, local and State government agencies, and organizations with which Rossmoor works.</b>				
*Policy COM-1.1	Maintain clear and timely lines of communication that flow freely among residents, including GRF employees, Board members, standing and <i>ad hoc</i> committees, the Mutuels, local and State government, and other pertinent entities.	GRF Board	CEO	Ongoing
Policy COM-1.2	Approach communication in a spirit of openness, recognizing that residents have a right to know what is going on and have an opportunity to provide input in decision making. A well informed community benefits everyone.	GRF Board	CEO	Ongoing

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*Action COM-1.1	Consider evaluating the development of additional methods of communication among GRF, Mutuals, and residents via e-mail, text messages, social media and/or emergency response systems. Develop an e-mail data base from all residents. Make available the referenced systems to the Mutuals in the event they need/want to communicate with residents. Encourage residents to provide emergency telephone information to be used in emergencies for robo calls and text messages. Consider developing a radio dispatch system that can link to CERT information posted on the Rossmoor website to improve the dissemination of emergency preparedness information throughout Rossmoor.	Director of Mutual/Trust Operations  Public Safety Manager	Director of Communications	2
Action COM-1.2	Update the Rossmoor websites (home page and Rossmoor News) daily so that information is current. Assure that web postings of pdf documents are searchable.	Director of Communications		Ongoing
Action COM-1.3	Explore giving residents the option of receiving the Rossmoor News online or by home delivery. The Golden Rain Foundation should obtain e-mail addresses from Rossmoor residents in order to make online home delivery of the News possible for those residents who would like it.	Director of Communications		
Action COM-1.4	Explore the option of access to GRF meetings and live interaction capabilities. Video stream Board meetings so residents can watch in real time and provide on-demand viewing. Consider alternating Board meetings to an afternoon and evening schedule. Continue posting Board and committees' agenda packages online.	GRF Board	CEO  Director of Communications  Executive Services Sr. Manager  Information Systems Manager	

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*Action COM-1.5	Enhance the marketing of Rossmoor by promoting it as "a community of active senior adults."	Director of Communications		2
Action COM-1.6	Consider appointing and training residents to serve as tour guides for people interested in buying a residential unit.	CEO Local Realtors	Director of Communications	1
*Action COM-1.7	Continue to improve marketing of Rossmoor to enhance manor sales and associated Membership Transfer Fee revenue.	Director of Communications		Ongoing
<b>TECHNOLOGY</b>				
<b>Goal TEC-1: Use appropriate, integrated technology that enhances the lives of residents and improves the convenience and efficiency in the provision of GRF services and facilities.</b>				
*Policy TEC-1.1	Use appropriate, integrated technology that enhances the lives of residents and improves the convenience and efficiency in the provision of GRF services and facilities.	CFO	Information Systems Manager	Ongoing
*Action TEC-1.1	Provide resources to keep current with best practices and technology and systems management.	CFO	Information Systems Manager Consultant	Ongoing
Action TEC-1.2	Periodically review available technology to identify opportunities to apply such technology throughout the GRF, assuring integration among all potential users.	CFO	Information Systems Manager	Ongoing
Action TEC-1.3	Stay abreast with new communications and infrastructure technology to enhance convenience and efficiency.	CFO	Information Systems Manager	Ongoing
Action TEC-1.4	Conduct on-going evaluation of communication technologies to enhance communication with residents and between all Mutual and GRF Boards and management staff in Rossmoor as appropriate.	CFO	Information Systems Manager	Ongoing
Action TEC-1.5	Consider a comprehensive, secure, reliable, and scalable wireless network to provide video, voice, and data transmission links to support GRF's governance, administrative, and security functions.	CFO	Information Systems Manager	3

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Action TEC-1.6	Consider establishing a qualified resident technology committee to advise the GRF Board on innovative issues.	GRF Board	CEO-CFO	1
<b>Goal TEC-2: A collaborative approach to IT systems and technical solutions to enable coordination among GRF departments and MOD operations.</b>				
Policy TEC-2.1	Maintain a collaborative approach to IT systems and technical solutions to enable coordination among all users.	CFO	Information Systems Manager	Ongoing
Action TEC-2.1	Consider implementing a single Rossmoor ID for resident identification, facility access and service provision.	Director of Resident Services	Information Systems Manager	2
Action TEC-2.2	Consider enabling residents' capacity to perform GRF business online and work toward a cashless (including checks) relationship.	CFO	Information Systems Manager	2
<b>GOVERNANCE</b>				
<b>*Goal GOV-1: Transparent, representative governance that is responsive to the needs of the Mutuels and Rossmoor residents.</b>				
Policy GOV-1.1	Maintain and revise, as required, GRF's bylaws, policies, procedures, and rules so that they continue to respond to the needs of Rossmoor residents.	Policy Committee	General Counsel	Ongoing
*Policy GOV-1.2	Continue to use a Trust Agreement and supporting policies as a vehicle for cooperative and interdependent GRF and Mutual governance.	GRF Board	General Counsel	5+
*Policy GOV-1.3	Continue to openly gather resident input on large projects before making decisions.	GRF Board	CEO	Ongoing
Action GOV-1.1	Maintain and enhance a simplified document and diagrams explaining the Rossmoor governance structure and use it consistently on the website, in the Rossmoor News, and in GRF materials sent to residents.	CEO	Director of Communications	Ongoing
*Action GOV-1.2	Establish a procedure for revising the Trust Agreement well in advance of expiration on April 19, 2034.	GRF Board	General Counsel	5+
Action GOV-1.3	Improve the publicity about the GRF absentee voting options for residents who are not present during a GRF voting period.	Director of Resident Services	Executive Services Sr. Manager	1

\* = Major conclusions and recommendations

CEO = Chief Executive Officer; CFO = Chief Financial Officer; HR = Human Resources

**GOLDEN RAIN FOUNDATION  
GENERAL PLAN  
OCTOBER 2016  
IMPLEMENTATION**

<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Action GOV-1.4	Continue to use resident audit and finance committees to examine financial performance and internal controls.	Finance Committee Audit Committee	CEO-CFO	Ongoing
Action GOV-1.5	Continue a review cycle for key operational processes to ensure GRF operations and resident services are relevant, efficient, and cost effective.	CEO	CFO Director of Trust Operations Director of Resident Services	Ongoing
<b>Goal GOV-2: Participation by Rossmoor residents in GRF governance.</b>				
*Policy GOV-2.1	Ensure that residents have appropriate opportunities to provide input in GRF decision-making processes by providing opportunities such as one-on-one meetings with the CEO, Town Hall meetings with a professional moderator, and statistically valid surveys using current technology to gauge resident opinion on key issues.	GRF Board	CEO	Ongoing
*Policy GOV-2.2	Encourage residents to participate in Ad Hoc and Resident Advisory Committees and CEO Advisory Groups, particularly when they have interests or expertise relevant to the topic being addressed.	GRF Board	CEO	Ongoing
Action GOV-2.1	Study whether to create a formal grievance procedure for residents with concerns related to GRF functions.	Policy Committee	General Counsel	2
Action GOV-2.2	Expand the training and orientation program for GRF Board members and others in GRF leadership positions. (Completed 2011).	CEO	Executive Services Sr. Manager	
Action GOV-2.3	Consider use of technology and alternative formats for GRF meetings with the objective to increase resident participation.	GRF Board	CEO Executive Services Sr. Manager	2
<b>HOUSING AND MUTUALS</b>				
<b>Goal HMU-1: A productive working relationship between GRF and all Mutuals in Rossmoor.</b>				
Policy HMU-1.1	Recognize and respect the independence of the Mutuals in their role within the community.	GRF Board	Mutual Liaison Committee	Ongoing

\* = Major conclusions and recommendations

CEO = Chief Executive Officer; CFO = Chief Financial Officer; HR = Human Resources

**GOLDEN RAIN FOUNDATION**  
**GENERAL PLAN**  
**OCTOBER 2016**  
IMPLEMENTATION

<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Policy HMU-1.2	Provide maintenance, financial, and other services to Mutuals that choose to purchase them through the GRF Mutual Operations Division.	GRF Board	Director of Mutual/Trust Operations CFO	Ongoing
Policy HMU-1.3	Collaborate with Mutuals on purchase of insurance and other operational items where joint action saves money for both GRF and Mutuals.	Director of Mutual/Trust Operations	Director of Mutual/Trust Operations CFO	Ongoing
Policy HMU-1.4	Review policies and procedures related to Mutuals to seek common agreement on any that may jointly affect the Mutuals and GRF.	Policy Committee	Mutual Liaison Committee	Ongoing
Policy HMU-1.5	Provide counseling and other services in the community to assist Mutuals with resolving personal and interpersonal issues that affect residents.	Director of Confidential Services	Counseling Services	Ongoing
*Policy HMU-1.6	Encourage Mutuals to publicize the cost of water to their residents, and encourage their residents to conserve water.	Mutual Liaison Committee	Director of Mutual/Trust Operations	1
<b>Goal HMU-2: Homes that are well-maintained, safe, and retain their value.</b>				
Policy HMU-2.1	Collaborate with Mutuals in areas where there is efficiency in combined outreach to residents (information through Rossmoor News and the TV channel), operations (MOD, handyman program), or other community-wide efforts (bulk insurance).	CEO	Director of Mutual/Trust Operations Director of Communications	Ongoing
Policy HMU-2.2	Support Mutuals seeking to reconfigure for enhanced management and governance.	Director of Mutual/Trust Operations		Ongoing
Policy HMU-2.3	Collaborate with Mutuals to ensure housing is maintained, repaired, and updated when indicated. Facilitate the application and approval process for interior remodeling of manors.	Director of Mutual/Trust Operations		Ongoing
Policy HMU-2.4	Collaborate with Mutuals on safety programs of common interest, such as fire and earthquake safety.	Director of Mutual/Trust Operations		Ongoing
Policy HMU-2.5	Coordinate GRF landscaping and other exterior design programs with Mutuals to ensure continuity between GRF and adjoining Mutuals, while encouraging variety and interest throughout the valley.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing

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CEO = Chief Executive Officer; CFO = Chief Financial Officer; HR = Human Resources

**GOLDEN RAIN FOUNDATION**  
**GENERAL PLAN**  
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IMPLEMENTATION

<b>Policy/Action Number</b>	<b>Text</b>	<b>Primary Responsible Party</b>	<b>Additional Parties Involved</b>	<b>Timeframe (Years)</b>
Policy HMU-2.6	Work with Mutuals to upgrade utility connections for Mutual-managed buildings in conjunction with remodels of facilities.	Director of Mutual/Trust Operations		Ongoing
Policy HMU-2.7	Work with the Mutuals to enhance fire safety measures such as alarms, sprinklers, fire stops, and extinguishers.	Director of Mutual/Trust Operations		Ongoing
Policy HMU-2.8	Work with the Mutuals to identify structures that may need earthquake retrofits, and devise an approach to undertake those retrofits in a systematic way.	Director of Mutual/Trust Operations		2
Policy HMU-2.9	<p>Work with the Mutuals, especially those containing co-ops, to enable residents with financial needs to devise mechanisms whereby those residents may access equity via reverse mortgages or other financial instruments.</p> <p><i>Editor's Note: Previous rulings by FHA/HUD limiting the insurability of reverse mortgages when a membership transfer fee is required to be paid were addressed by the passage of HR3700 the "Housing Opportunity Through Modernization Act of 2016," primarily due to the lobbying of national organizations. In all other respects, HMU-2.9 relates to limitations imposed on borrowing by regulatory authorities, largely based on factors inherent in each individual Mutual. Such factors are beyond the control of GRF and require the involvement of counsel for the applicable Mutual.</i></p>	Director of Mutual/Trust Operations	General Counsel	1
<b>Goal HMU-3: Thoughtful review of potential new housing development.</b>				
Policy HMU-3.1	If additional new housing is desired within Rossmoor, work with the Mutuals and the City of Walnut Creek to study this possibility.	CEO		Ongoing
Policy HMU-3.2	If additional new housing is studied, consider impacts on the environment, services, facilities, and other important aspects of the Rossmoor community.	CEO		Ongoing

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GOLDEN RAIN FOUNDATION  
GENERAL PLAN  
OCTOBER 2016  
IMPLEMENTATION

Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
<b>IMPLEMENTATION</b>				
<b>Goal IMP-1: A GRF that responds to current conditions and looks ahead to anticipate Rossmoor's future needs.</b>				
Policy IMP-1.1	Review the General Plan and other GRF governing policy documents periodically to ensure they reflect community priorities.	Policy Committee	CEO General Counsel	Ongoing
*Action IMP-1.1	Require staff to review the implementation of the General Plan annually and report to the GRF Board in June of each year starting in 2012.	GRF Board	CEO	1
*Action IMP-1.2	Assemble an Ad Hoc Task Force in the years 2015 and 2020 to formally reassess and update the Plan.	GRF Board	CEO	5+

\* = Major conclusions and recommendations

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A P P E N D I X A

G L O S S A R Y



## APPENDIX A

### GLOSSARY

- ◆ Active Recreation Area: Athletic facilities, community gardens, dog parks, and other areas where individuals participate in similar activities.
- ◆ Activities Council: The Activities Council supports Rossmoor Community Organizations by providing a forum to share news and directives, resolving problems within clubs and making donations for the benefit of Rossmoor and for club liability insurance coordinating.
- ◆ Age in Place: The ability to live in one's own home and the Rossmoor community for as long as possible.
- ◆ Amenity: A service or feature that provides comfort, convenience, or enjoyment.
- ◆ Assisted Living: A legally-defined term identifying a type of long-term care facility for elderly or disabled people who are generally able to get around on their own but who may need help with some activities of daily living.
- ◆ Baby Boomer: The United States Census Bureau considers a baby boomer to be someone born during the demographic birth boom between 1946 and 1964.
- ◆ Bicycle (or Bike) Facility: Any lane, path, or shoulder for use by bicyclists; a traffic control device, shelter, or parking facility for bicycles.
- ◆ Boomer (See Baby Boomer)
- ◆ Budget Principles: Fundamental concepts underlying the annual budget preparation review process undertaken by the Finance Committee, staff, and GRF Board.
- ◆ Capital Expenditures: Funds spent to acquire an asset for long-term use, including construction of facilities and acquisition of equipment valued over \$5,000.
- ◆ Car-Sharing: A program that places vehicles in locations throughout a community and allows people to check out the vehicles for short-term use, using a web- and phone-based reservation system.

- ◆ Common Interest Development: An apartment building, condominium building, or other development in which there is some common ownership of either buildings or common areas.
- ◆ Community Service Organization: A nonprofit entity, other than an association, that is organized to provide services to residents of the common-interest development or to the public in addition to the residents, to the extent community common areas or facilities are available to the public. (California Civil Code §1368 (c)(3))
- ◆ Congregate Living: Facilities that provide social activities, security, and non-health related services such as meals, housekeeping services and transportation.
- ◆ Coupon: Monthly fee paid by residents to their Mutual for GRF to provide community-wide facilities, services, and programs and cable TV.
- ◆ Davis-Stirling Act: The sections of the California Civil Code, enacted in 1985, that govern condominium, cooperative, and planned unit development communities in California.
- ◆ Defensible Space: 100-foot area around a structure where trees and brush have been thinned to provide fire-fighters with space to fight grassland or other wildfires.
- ◆ Emergency Evacuation Route: Designated streets and access points in Rossmoor intended to allow smooth exit during an emergency; includes the entry gate and other streets that are kept clear for emergency entry and exit.
- ◆ Emergency Preparedness: Addressing and avoiding risks associated with natural or human-induced disasters.
- ◆ Fire Stops: Passive fire protection systems designed to impede the spread of fire through a building by sealing openings and joints in the building.
- ◆ GRF: The Golden Rain Foundation serves as the trustee of Rossmoor's common areas, including operations for those areas.
- ◆ Habitat Mitigation: The protection in perpetuity of habitat in one location, in exchange for which habitat in another location can be disturbed. Protection is funded by the entity disturbing habitat.

- ◆ Hazardous Waste: Waste that poses substantial or potential threats to public health or the environment.
- ◆ Heat Island Effect: The phenomenon of cities and suburbs have higher air temperatures than rural areas, primarily because of the replacement of plants with concrete and asphalt
- ◆ Hot Day Program: A program that provides a cool place and activities in a central location on hot days so that individual residents do not need to run their air conditioning.
- ◆ Implementation: Carrying out the Actions listed in this General Plan.
- ◆ Life Care: The provision of services for elderly people, including housing, health care, and social activities.
- ◆ Manor: An individual housing unit within Rossmoor.
- ◆ Membership Transfer Fee: Payment made to GRF by new Rossmoor manor owners at the time of sale.
- ◆ Mutual Operations Division (MOD): The portion of the GRF that provides property management services to Mutuals within Rossmoor on a contract basis.
- ◆ Mutual: Homeowners association responsible for a group of manors that are collectively managed.
- ◆ Open Space: Land in a predominantly open and undeveloped condition that is natural, has little or no disturbance, and is primarily used for passive recreation, conservation of habitat, scenic value, or other undeveloped purposes. However, open space may be developed for provision of community facilities.
- ◆ Paratransit: Flexible transportation service for disabled persons who are unable to use other forms of transportation; does not follow a fixed route or schedule.
- ◆ Park: A landscaped area with amenities that can be used by Rossmoor residents, including benches, picnic tables, or active recreational facilities.
- ◆ Planned Unit Development: A zoning designation that allows for a whole property to be developed with a mix of uses, including housing and services.

- ◆ Passive Recreation Area: Minimally developed facilities including landscaping, natural areas, picnic facilities, trails, and other places with limited development.
- ◆ Riparian: A place at the intersection of land and a river or stream.
- ◆ Roadway Network: Streets in Rossmoor that are maintained by the GRF.
- ◆ Rossmoor: The community in Walnut Creek managed by the GRF, in conjunction with the resident Mutuels.
- ◆ Savanna: An open grassland ecosystem with widely spaced trees.
- ◆ Speed Table: A traffic calming device consisting of a wide speed bump with a flat area in the middle.
- ◆ Traffic Calming: Street design intended to slow or reduce auto traffic to improve safety for pedestrians and bicyclists, as well as for residents in general.
- ◆ Transparent Government: A government where decision-making is carried out publicly and information is accessible and available to those governed.
- ◆ Travel Training: Customized introduction to the Rossmoor bus system including schedule and route information and accompaniment on a bus ride.
- ◆ Trust Agreement: 1964 document establishing GRF as the entity that holds in Trust and manages common properties on behalf of the Mutuels.
- ◆ Trust Beneficiary: Persons or legal entities, such as Mutuels, with equitable ownership of the assets of the trust.
- ◆ Trust Fund: Monies available for GRF capital expenditures, derived primarily from the Membership Transfer Fee.
- ◆ Trust Property: Property owned and managed by the GRF.
- ◆ Trustee: Person or legal entity, such as GRF, that holds property on behalf of the beneficiary.
- ◆ Universal Design: The design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design.

- ◆ Wellness: A healthy balance of the mind, body, and spirit that results in an overall feeling of well-being.
- ◆ Wireless Network: A wireless local area network that allows users with a personal computer, mobile phone, MP3 player, or personal digital assistant to access the internet so long as they are in range of the wireless transmitter.

A P P E N D I X B

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**BIBLIOGRAPHY**

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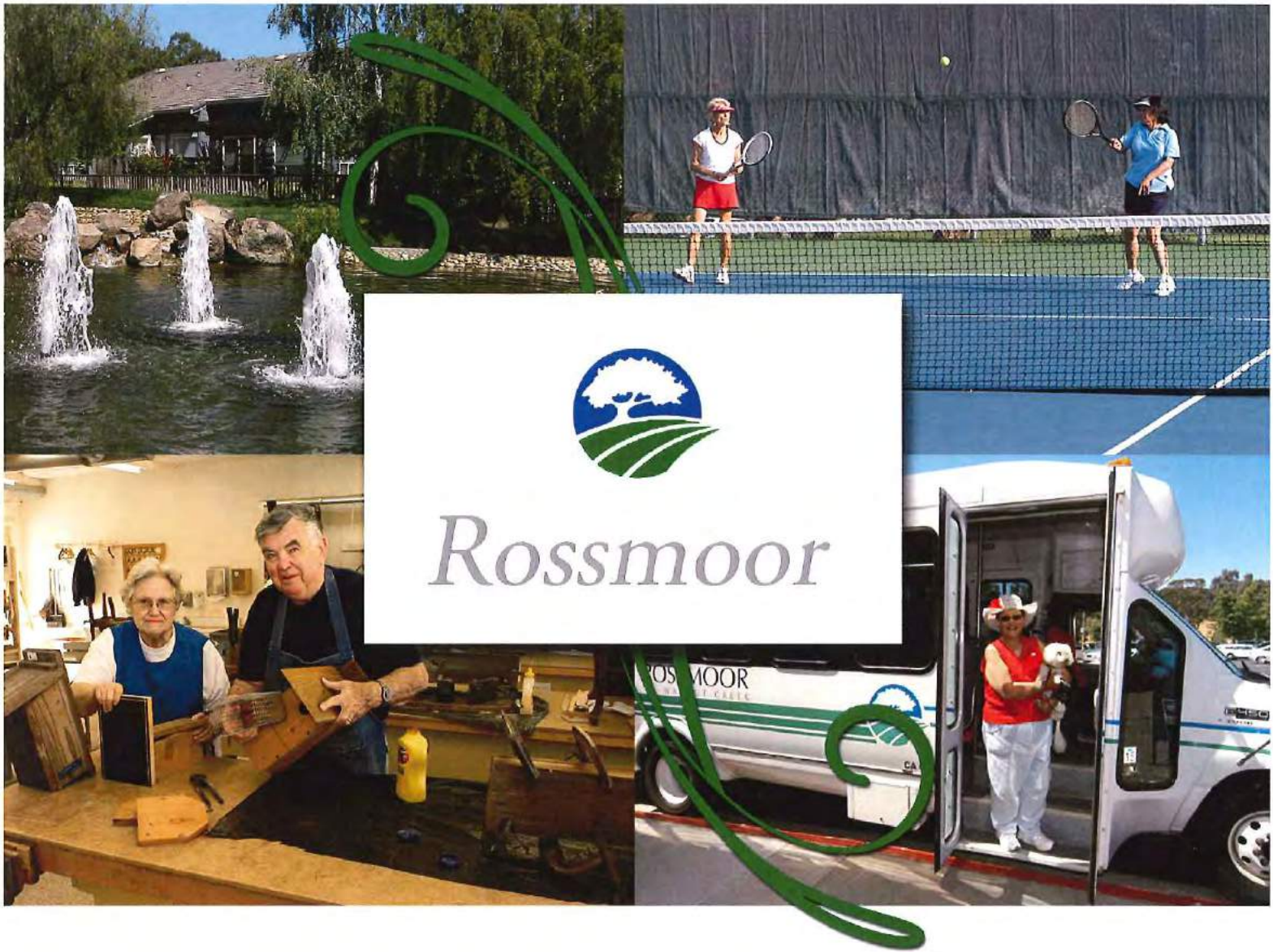
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## A P P E N D I X C

### C O M M U N I T Y S U R V E Y R E P O R T

Executive Summary follows. The full Report is available at the GRF administrative offices and is also available at the following web address:  
<http://rossmoor.com/resident-info/rossmoor-survey-2010>.





## **Rossmoor Community Survey Report**

**Presented to the Golden Rain Foundation**

**March 2010**

**[bw] RESEARCH  
PARTNERSHIP**

## **EXECUTIVE SUMMARY**

### **INTRODUCTION TO THE STUDY**

The Golden Rain Foundation (GRF) and its Long Range Planning Task Force (LRPTF) partnered with BW Research Partnership, Inc. (BW Research) to conduct a community survey to support the process of creating Rossmoor's Long Range Plan. The Plan will be a comprehensive, wide-ranging policy plan covering all facets of the Rossmoor community and will identify current and projected needs to 2025. Rossmoor's original General Plan was developed in the mid 1990s and was published in 1997.

As part of the project, BW Research conducted a statistically representative telephone survey of residents and also made available a paper and web version of the telephone survey, referred to as the "self-selected survey," for those who did not complete a telephone survey and wanted to participate in the process. The surveys conducted by BW Research are just one piece of the long range planning process being led by the consulting firm Design, Community & Environment (DCE).

This report focuses on the results of the statistically representative telephone survey conducted by BW Research to support the planning process. The main research objectives of the study were to:

- Assess satisfaction with the management of Rossmoor and the GRF's efforts to communicate with residents;
- Assess expectations for Rossmoor;
- Identify amenity use, preferences, and priorities;
- Explore residents' perceptions regarding the value of their monthly coupon; and
- Develop a demographic profile of residents.

### **METHODOLOGY OVERVIEW**

The community-wide telephone survey of Rossmoor residents was administered from January 14 through 26, 2010 and each interview averaged 12.5 minutes in length. The survey was focused on Rossmoor residents and excluded renters, live-in employees, and guests.

In total, a statistically representative sample of 600 Rossmoor residents completed a telephone survey, resulting in a maximum margin of error +/- 3.87 percent (at the 95 percent level of confidence) for questions answered by all 600 respondents.

Articles were published in the Rossmoor News both before and during data collection to inform residents about the project, legitimize the process, and encourage participation. Residents of all ages were cooperative throughout the telephone survey process. The refusal rate was only 15 percent among those contacted – one of the lowest refusal rates we have encountered during our 10 years conducting telephone survey research. For more detail on the survey methodology, please refer to the Methodology Section of the report beginning on page 53.

## **KEY FINDINGS**

Based on the analysis of the telephone survey data, BW Research is pleased to present the Golden Rain Foundation with the following key findings. Please refer to the body of the report for a more comprehensive analysis of findings, including comparisons among resident sub-groups.

### ***What Attracted Residents to Rossmoor***

Twenty-two percent of residents indicated that they were most attracted to the quality of life in the community, 21 percent were attracted to Rossmoor because it was near their family, 18 percent valued the security, and 18 percent cited the location.

### ***Satisfaction with Management of Rossmoor***

Eighty-four percent of residents were satisfied with the management of Rossmoor's services, programs, and amenities. Specifically, 54 percent were "Very satisfied," 30 percent were "Somewhat satisfied," five percent "Neither satisfied nor dissatisfied," nine percent were dissatisfied, and two percent did not know or declined to state.

Among the nine percent of residents who were dissatisfied (52 respondents), the top reasons cited for their dissatisfaction related to Rossmoor not being well run, governance, and leadership issues (41%) or that Rossmoor was too expensive (38%).

### ***Rossmoor as Last Home Purchase***

When residents first moved to Rossmoor, approximately eight in 10 (82%) intended that it would be their last home purchase, 12 percent did not, and six percent did not know or declined to state.

### ***If Could No Longer Live on Own***

Fifty-eight percent of residents indicated that they would stay in Rossmoor with a caregiver if they could no longer live on their own, 18 percent would move out of the community, and 24 percent did not know, were not sure, or declined to state.

### ***Differing Opinions: Rossmoor's Priorities***

Residents were presented with the opinions of two hypothetical neighbors who live in Rossmoor and who disagree about Rossmoor's priorities in the future.

- Mr. White believes that the Golden Rain Foundation should provide more services to less active senior residents who need more assistance to continue to live in Rossmoor.
- Mr. Jones believes that the Golden Rain Foundation should maintain an active senior community and not expand services for the residents who need more assistance to continue to live in Rossmoor.

Forty-nine percent of residents felt that Mr. Jones' opinion was closest to their own, 37 percent identified with Mr. White, six percent a combination of the two, three percent neither opinion, and five percent were not sure or declined to state.

### ***Participation in Rossmoor Services and Programs***

Overall, between 42 percent and 72 percent of residents had never utilized six of the eight services and programs evaluated in the survey.

Examining overall use (having ever used the program or service), entertainment activities were the most popular (86% participation), followed by fitness activities and programs (74%), organized day trips and/ or extended travel for activities or performances (57%), and social activities (56%).

In terms of regular use (once a week or more), 40 percent of residents participated in fitness activities and programs, 32 percent participated in entertainment activities (such as concerts, plays, or movies), and 20 percent regularly participated in social activities (such as games and dances).

### ***Amenity Preferences***

For the same eight programs and services, residents were asked whether they would like to see more of each type of program or service or whether they felt there was currently an adequate amount. At the introduction of the question, residents were reminded that the operation and maintenance of the programs was paid out of the coupon.

Between 70 percent and 86 percent of residents felt there was currently an adequate amount of each program or service. Entertainment, such as concerts, plays, or movies received the most residents indicating they would like to see “More,” at 17 percent.

### ***Improvement Priorities***

When presented with a list of seven improvement projects being considered for Rossmoor, between 51 percent and 74 percent of residents considered each potential project as a “Low priority.”

The two projects with the most support were to “Expand walking trails in Rossmoor to connect to open space and surrounding park land” (44% “High priority) and “Develop and expand environmentally-friendly programs and facilities” (38% “High priority).

### ***Value of Monthly Coupon***

The majority of residents perceived the amenities provided for their monthly coupon to be an “OK value” (50%), 41 percent viewed them as a “Great value,” seven percent a “Poor value,” and two percent did not know or declined to state.

When asked how to improve the value of the coupon, the seven percent of residents who felt the coupon was a poor value (40 respondents) cited various topics. No single response category was cited by more than 12 percent of respondents and 21 percent indicated they did not know or had no answer.

### ***Differing Opinions: Monthly Coupon***

Residents were presented with the opinions of two hypothetical neighbors who live in Rossmoor and who disagree about what Rossmoor should do with its monthly coupon.

- Mr. Brown believes that the current programs and facilities at Rossmoor are fine and he does not want to increase our monthly coupon for any new or expanded programs, services, or facilities.
- Mr. Davis believes in improving the quality of life in Rossmoor through new programs, services, or facilities, which would be worth a few more dollars on our coupon.

After reading each neighbor's opinion, residents were asked to select the opinion closest to their own. The vast majority, 73 percent, agreed with Mr. Brown that the coupon should be kept as low as possible.

### ***Satisfaction with Communication***

Overall, 84 percent of residents were satisfied with the Golden Rain Foundation's efforts to communicate with residents about news, events, and activities and 13 percent were dissatisfied.

Specifically, 50 percent were "Very satisfied," 34 percent were "Somewhat satisfied," 10 percent were "Somewhat dissatisfied," four percent were "Very dissatisfied," and three percent did not know or declined to state.

When asked how to improve communication, the top issues cited among the 13 percent of residents dissatisfied with communication efforts (79 respondents) related to GRF meetings and the decision-making process (54%) and improving and expanding the Rossmoor News (22%).

### ***Use of Information Sources***

Rossmoor News was the most utilized source for news and information at 99 percent overall use and 92 percent regular use (once a week or more).

Sixty-six percent of residents referred to Channel 28 for Rossmoor news and information and 12 percent of residents regularly watched Channel 28.

Thirty-six percent of residents utilized Rossmoor's websites for information, with four percent regular use.

### ***Demographics***

The survey universe included 6,395 households (count excludes rental households) and 9,055 residents (count excludes renters, live-in employees, and guests).

### ***Where Lived before Rossmoor***

Prior to moving to Rossmoor, 37 percent of residents lived in a neighboring city, 33 percent the Bay Area, 13 percent somewhere else in California, and 17 percent another state.

### ***Rossmoor as Primary or Secondary Residence***

Ninety-seven percent of residents surveyed considered Rossmoor to be their primary residence.

***Currently Work for Pay***

Sixteen percent of residents worked for pay, nine percent part-time and eight percent worked full-time.

***Computer Use***

Sixty-nine percent of residents used a computer to access information, for shopping, or to send and receive email.

***Caregiver Status***

Seven percent of Rossmoor residents served as a caregiver for another adult Rossmoor resident.

Seven percent of residents had a caregiver, five percent a part-time caregiver and two percent a full-time caregiver.

***Household Income***

The median household income of Rossmoor residents at the time of the survey was \$50,000 to \$74,999.

***Household Net Worth***

The median household net worth of Rossmoor residents at the time of the survey was \$250,000 to \$499,999.

***Gender***

Sixty-five percent of residents surveyed were women and 36 percent were men, which was consistent with the overall universe of Rossmoor.

***Age***

The average age of Rossmoor residents surveyed was 77.9 years and the median age 79 years (same as universe of residents).

***Years since Last Ownership Change of Unit***

The median number of years since the last ownership change of Rossmoor units at the time of the survey was eight to nine years.

The percentage breakdown for the number of years since the last ownership change of unit among households surveyed was consistent with the overall universe of households.

***Basic Monthly Coupon Amount in 2009***

The 2009 basic monthly coupon amount provided to BW Research in the GRF database was defined as the sum of the GRF Assessment and Mutual Assessment.

To maintain an “apples to apples” comparison across different unit types, the property taxes and in some cases, mortgage payments that are included in the total co-op

coupon were not included in the definition of the basic coupon amount since those items are not included in the coupon for condo units.

Most households had a basic coupon amount of \$463 to \$553 (36%) or \$602 to \$650 (32%) in 2009. The percentage breakdown for the basic monthly coupon amount among households surveyed was consistent with the overall universe of households.

#### ***Geographic Area of Residence***

Prior to the survey, BW Research was provided with a map of Rossmoor and grouped the Mutuals into geographic areas. Approximately 30 percent of households surveyed were located in Area 2, defined as the First Walnut Creek Mutual (29.2%) and Walnut Creek Mutual 56 (0.2%) and Walnut Creek Mutual 65 (0.3%).

Among households surveyed, the percentage breakdown by geographic area was consistent with the overall universe of households.

In addition, the percentage breakdown of each Mutual within the geographic areas was consistent with the overall universe of Rossmoor households.

## **CONCLUSIONS**

BW Research offers the following conclusions to the Golden Rain Foundation from the 2010 Rossmoor Telephone Survey Community Research.

#### **Overall Satisfaction with Rossmoor**

Overall, residents of Rossmoor are quite satisfied with the management and quality of life offered at Rossmoor. This statement is based on the following results from the telephone survey:

- More than four out of five residents (84%) were satisfied with the overall management of Rossmoor's services, programs, and amenities and just as importantly, less than one in 10 (9%) were dissatisfied.
- Examining satisfaction with the overall management of Rossmoor, not one single group by age, gender, geography within Rossmoor, or length of residence within the community had less than 75 percent satisfaction. So while there is no doubt that there are small pockets of dissatisfaction within the community, they are a minority of each demographic group within Rossmoor.
- Over 80 percent (82%) of residents intended Rossmoor to be the last place they live, and more than half (58%) planned on continuing to live in the community even if their physical circumstances change and they would require a caregiver to assist them. Another 24 percent were not sure what they would do and less than 20 percent would move out. This general expectation to continue living in Rossmoor even when circumstances require additional resources conveys some desire to continue with one's current quality of life.
- Most residents did not feel that the community needs to improve the quality of life for its residents. If residents were generally unsatisfied with the quality of life

provided at Rossmoor, we would have expected more residents to support Mr. Davis, the hypothetical resident who advocated for paying a few more dollars a month on the coupon to improve the quality of life in the community. Particularly, we would have expected to see a majority of the more affluent (measured by either annual income or household net worth) residents who would be less likely to be concerned with a few extra dollars a month, and that was not the case.

- Residents were again largely satisfied with the job the GRF is doing to communicate with residents. Residents' perception of communications efforts is often closely tied to overall satisfaction with the management and leadership within a given community and in Rossmoor, there is a strong relationship between satisfaction with the overall management of Rossmoor and GRF's communication efforts.

### **Sensitivity to Additional Expenditures and a Higher Monthly Coupon**

While Rossmoor residents indicated relatively high levels of satisfaction with GRF and the management of the community, there was an underlying concern with increasing expenditures and ultimately increasing the cost of the monthly coupon. The results of the Brown vs. Davis question that examined whether residents would prefer to increase the monthly coupon by a few dollars a month to improve the quality of life vs. doing everything possible not to increase the monthly coupon, can rightfully be interpreted at some level as a general satisfaction with the quality of life in Rossmoor. However, it should also be interpreted as providing a strong argument for minimizing additional discretionary expenditures that could impact residents' monthly coupon. This general argument is further supported by the data that showed a relatively balanced usage of the programs and activities that were investigated in the survey, with little feedback that current programs are overcrowded and the low percentage of residents that indicated each of the programs and activities tested should be expanded.

### **Active Senior Living vs. Facilitating Extended Living in Rossmoor**

In many areas of the survey, there was a general agreement among Rossmoor residents that largely transcended their age, length of residence, and income levels. However, there was one issue that stood out in the results where there were strong differences among residents, both in terms of overall results as well as significant differences among resident sub-groups. Almost half of residents (49%) believed that the GRF should focus on maintaining an active senior community and not facilitate less active seniors to live longer in Rossmoor. A smaller percentage (37%), but still more than one-third of residents, disagreed and believed that the GRF should be doing more to help less active senior residents live in the community longer. Younger, more affluent residents who actively used the computer were more likely to agree with the first sentiment (focus on active senior living), whereas older, less affluent residents, who did not use the computer regularly were more likely to agree with the second sentiment (focus on facilitating less active seniors so they can continue to live in Rossmoor). This issue is one that residents will need to continue to discuss to forge some consensus in the planning process.

The body of the report focuses on the results of the statistically representative telephone survey. For additional detail on the findings and a complete assessment of the telephone survey results, please proceed to the body of the report beginning on the next page.

A P P E N D I X D

ROSSMOOR TASK FORCE  
AND COMMUNITY MEETINGS  
RE: 2010 PLAN



# **Appendix D – Rossmoor Task Force and Community Meetings re 2010 Plan**

The full text of the items listed below is available by request at the GRF administrative offices.

Minutes of Task Force meetings and Town Hall meetings of July 17, 2010 and October 30, 2010

Tallies from July 17, 2010 Town Hall of draft recommendations and ideas suggested by residents

Task Force Scope/Ideas list dated November, 2009

Materials for Kick-off meeting with Design, Community and Environment (DCE) – December 2, 2009

Summaries of Task Force meetings with Design, Community and Environment 2010

Toured Rossmoor and some surrounding areas by bus on April 15, 2009.

Attended MOD Workshop on June 24, 2009

Interviewed two firms for Planning and 3 firms for surveying.

Reported to the GRF Board on approximately a quarterly basis.

A P P E N D I X E

JUNE 22, 2010 MEMO FROM  
SALMONS RE: SITE TOUR

.....



# ROSSMOOR

## WALNUT CREEK

DATE: June 22, 2010

TO: Ad Hoc Long-Range Planning Task Force

FROM: Warren Salmons, CEO W.S.

SUBJECT: Site Tour

This memorandum represents the collective report from the Task Force Sub-Committee, Ron Moschel and Mary Hufford, with respect to its tour of the undeveloped property.

The Sub-Committee, Nancy Bann, and I first met to review an aerial photograph of Rossmoor and various maps: City of Walnut Creek zoning, general plan, and slope/landslides. Sites were discussed vis-à-vis existing conditions: land use, slope, utilities, access, size, etc. After touring the valley to evaluate various locations, the Sub-Committee met to discuss its findings:

1. With respect to the vast majority of the GRF's ± 700 acres of natural open space: topography, undisturbed natural vegetation, utility and access impediments, and aesthetics (views/vistas from residential areas) render this land most suitable for retention as open space/habitat area with potential value for sale of mitigation bank easements for critical plant and animal species which are indigenous to our area.
2. A several acre area near the Garden Club access road off of Tice Valley Boulevard (see location map), which is physically removed from the rest of the valley, may have potential for development for a few large lots for custom, single family homes which would not ultimately be part of Rossmoor.
3. The Cactus Garden area near the entrance gate may have potential for future development. This approximately 1.2 acre area is relatively flat, has some utilities available and has access to Rossmoor Parkway outside of the gate.
4. Although physically challenging, an approximately .5 acre site at the intersection of Grey Eagle Drive and Terra Granada Drive, once evaluated for a pool complex, has potential for development as previously illustrated.
5. A .8 acre portion of the "landscaped berm" along Golden Rain Road, when considered in context with a portion of the exceptionally wide Golden Rain Road at this location, may have potential for community serving "micro" commercial or recreational use.

6. A .7 acre area of lawn, a portion of which is currently used as a temporary golf course maintenance equipment parking area, has potential for use for additional recreation or parking associated with the Creekside Clubhouse and tennis courts.

7. The .75 acre area master planned location for the Creekside event center and associated parking should continue to be considered as a future development area.

8. The 6,000 square foot lawn area adjacent to the Hillside pool locker room building and a similar size portion of the lower end of Sportsmen's Park have potential to accommodate a relocated/permanent table tennis facility or other similar sized building.

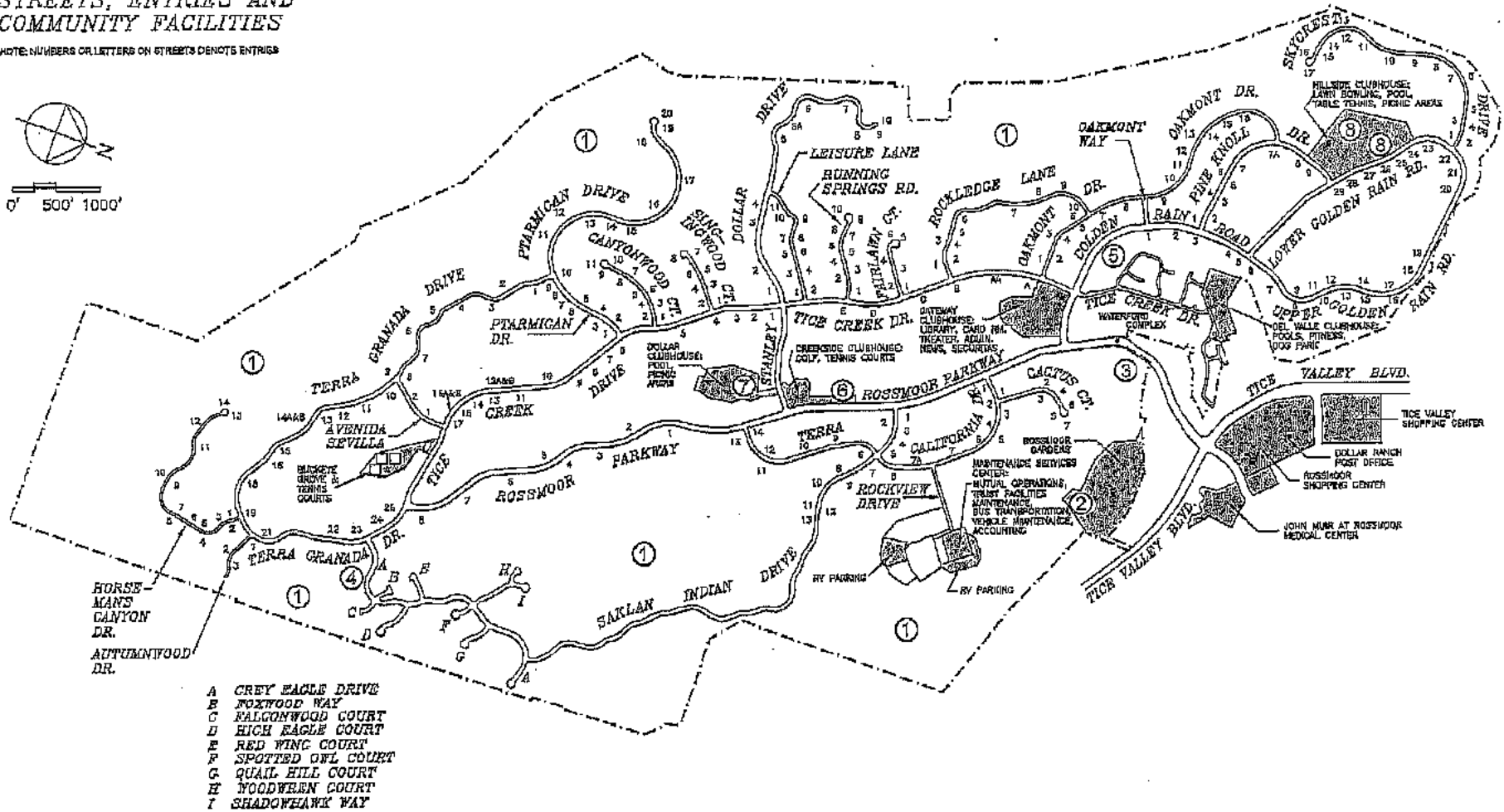
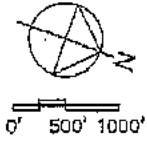
The Sub-Committee does not recommend identification of specific developments for specific sites within the long-range plan other than to continue to recognize the event center site as an already master planned location. However, the Sub-Committee suggests that a limited number of modestly sized development sites and significant habitat easement potential exist and should be acknowledged by the long-range plan.

WTS/kv

# ROSSMOOR-WALNUT CREEK

## STREETS, ENTRIES AND COMMUNITY FACILITIES

NOTE: NUMBERS OR LETTERS ON STREETS DENOTE ENTRIES



A P P E N D I X F

NINE FOCUS GROUP SUMMARIES –  
FEBRUARY AND MARCH 2010



## APPENDIX F

### **FOCUS GROUPS AND PRESENTATION SUMMARIES**

*Nine Focus Groups were held<sup>1</sup>*

Mutual Presidents

Philosophy and Vision

Programs, Services, and Facilities

Governance and Communication

Activities Council

Real Estate Agents

GRF Committee leaders

New Residents

Working Residents

*13 Speakers or presenters to Task Force<sup>1</sup>*

#### Non-Rossmoor Presenters

Roger Bush, Saxon Hamilton, regarding planning and facilitation

Charles Hester, Godbe Research, regarding the conduct of surveys.

#### GRF Presenters

Paul Donner, Director, Mutual Operations

Priscilla Tudor, Coordinator, Counseling Services

Betsy Hocking, Supervisor, Recreation Department

Dennis Bell, Safety and Security

Maureen O'Rourke, Senior Manager, Communications

Shannon Walpole, General Counsel, Confidential Services

Rick Chakoff, CFO

Dan Schrantz, Director Trust Operations

Mark Heptig, Director of Golf, PGA Head Professional

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<sup>1</sup> Summaries for all Focus Groups and most presentations are available at the GRF administrative offices.

**GOLDEN RAIN FOUNDATION  
GENERAL PLAN  
APRIL 2011**

APPENDIX F: FOCUS GROUP AND PRESENTATION SUMMARIES

Warren Salmons, CEO, Resident Services, Trust Estate Fund Cash Flow Model

Ken Haley, Finance Committee Chairman, Reserves for GRF Trust Estate Fund and  
GRF Operating Fund

A P P E N D I X G

I D E A S / P L A N S O F F E R E D B Y  
O R G A N I Z E D G R O U P S



## Suggestions and Ideas offered by organized group –

### A. Community Emergency Response Team (CERT) @ Rossmoor Organizational Needs For Readiness & Response to Disaster

1. **Purchase 40 FRS Mobile Radios** for Communication
2. **Support development of a Rossmoor CERT website** to communicate, train, launch shared activation protocols/documentation, drill information and resources
3. **Support GRF Staff to securely consolidate/maintain existing database/spreadsheets** of Rossmoor disaster personnel, resources
4. **Coordinate activation of GRF Disaster Response Incident Command Center**; 911 Monitoring, Reverse 911, mobile/email text notification communication to residents of need to "1). Shelter in Place, 2. Ready for Evacuation, 3. Evacuation & Transport"
5. **Provide work space** for CERT (& Rossmoor disaster response organizations such as Emergency Preparedness Organization -EPO) business operations
6. **Procure dedicated storage/cargo container** including current/additional supplies for disaster operations support both for people & pets
7. **Ensure GRF staff, employees, Securitas are disaster first-responders** and assigned through duration
8. **Activate & mobilize GRF resources** to appropriately respond to protect residents, GRF facilities, communications, transportation, etc.
9. **Coordinate GRF Disaster Response Planning** with Securitas, Mutuals, CERT, Contra Costa Office of Emergency Services, City of Walnut Creek, Red Cross, EPO, Crisis Response Spiritual Care Program, Counseling Services, CB's/Ham Radio Operators, Disaster Animal Response Teams, etc.
10. **Purchase & Install** one to three CB Radio Repeater Antenna
11. **Sponsor GRF staff, employee CERT & other disaster response training and co-sponsor resident & CERT staging area drills**
12. **Ensure & encourage Risk Management strategies** to minimize damages to GRF Trust Assets, Mutual properties and residents; for example compliance with Contra Costa County "Defensible Space" standards for wild land firestorm mitigation.

On a scale of 1-5, items # **1, 4, 7, 8, 9, 11, 12** are immediate, extremely high priorities, each ranked as a high 4-5 on the scale.

### B. Drama Association

We are aware that the proposed event center in the Tice Creek development would contain a stage. We hope your master plan recommendations would encompass obtaining a professional consultant skilled in theatre design as an adviser in this project. Event options to meet the drama association needs:

--The traditional proscenium stage. This has the advantage of good backstage areas, possible fly-space for scenery and footlights.

--The thrust stage, with the audience on three sides. The thrust stage can match the traditional proscenium model with ample room behind the set for dressing rooms and storage. This model would probably be considerably more economical than the proscenium version.

--Lighting. Needs to be adequate lighting on stage and so-called "house lighting" as well.

--Sound. This is particularly critical in retirement communities like ours, where some hearing loss is developing. It should include sufficient speakers and sufficient microphones. None of Rossmoor's halls

are noted for quality acoustics, for speaking or music.

--A sound and light board booth.

--Backstage: Dressing rooms and storage space. An intercom system is needed to connect backstage with the sound and lighting booth.

--A ticket booth at the entrance to the event center.

## C. GRF Fitness Center Advisory Committee Plan

April 2010

### *IMMEDIATE REQUIREMENTS WITHIN CURRENT SPACE:*

- **COMPUTER ACCESS SYSTEM** – manage ingress/egress control, resident usage tracking data, required paperwork tracking, and sales tracking. Such a system allows for proper monitoring of residents' guests and curbs misuse by non-residents. It will also aid in providing friendlier and more streamlined service as users enter the facility.
- **ADDITIONAL HANDICAPPED / GOLF CART PARKING SPACES** – more parking in both the main parking lot and near main entrance is needed.

### *LONG RANGE:*

- **TRAINER CONSULTING ROOMS** – w/ 5 partitioned cubicles (one designated for special testing) 30x40  
There has been a dramatic increase in use of the facilities and a notable development of successful skilled evaluations, training, and personalized programming for residents. Consequently, staff members require additional private space for taking medical and personal health histories for purposes of discussing confidential and sensitive information.
- **STRETCH AREA** – 17ft. open space + 10ft. for tables space x 30ft. wide 27x30  
Since flexibility is vital to the older adult population, there needs to be reasonable space allocated for stretching. Having tables of various heights available would be ideal as many older adult cannot get down to, or up from, the floor.
- **MESSAGE ROOM** – Current stretch room 10x12  
Massage is a highly requested and desired amenity for pain management, stress relief, and overall well being. Currently, massage therapists may only go to resident homes however there have been numerous requests to have this amenity centralized at the Fitness Center. Providing such an additional service will fill a demand in the current community and attract future buyers. This could also possibly create an additional source of revenue.
- **BREAK / STAFF MEETING ROOM** – TV, refrigerator, microwave, room large enough to accommodate 12 staff for meetings 20x20  
Presently, staff has no place for breaks or meetings away from public view, thus breaks, meal times, and staff meetings are frequently interrupted.
- **STORAGE** – for office and cleaning supplies, small equipment, etc.

Presently, both fitness and custodial staff have limited space for supplies necessary to perform daily operations.

- **FRONT DESK / RECEPTION AREA** – tables, chairs, bookcases, magazine racks 69x69  
There have been numerous requests for an enlarged area for residents to socialize, wait for appointments, friends, transportation, or catch up with reading. Also create an area for sales of Fitness & Aquatics accessories, health drinks, and energy bars. Residents can purchase a healthy snack, visit or read. Not only is socialization is a key element in healthy aging but this is another opportunity for an additional source of revenue.
- **INDOOR WALKING / RUNNING TRACK** – 6ft wide 1/8 mile long  
Will allow exercise in inclement weather (hot, cold, rainy, windy) and when dark; will also allow more options for wheelchair exercise.
- **SMALL ROOM** – buffered for speed bag, boxing, Vibraflex 12x18  
The speed bag, heavy punching bag, and Whole Body Vibration platforms are very noisy and need a separate area so as not to disturb other fitness users.

#### **BALANCE PROGRAM SPACE – 30x30**

A designated area for balance programming free and clear of any obstructions will provide a safer area for residents to improve balance and coordination. Area may be used for other purposes as well. A balance bar will be installed on wall. Storage cabinets or shelves will be located on wall to store various types of balance equipment. Flooring will have special imbedded markings for specific balance-type work.

- **YOGA / PILATES / MEDITATION** – sound-buffered and warmer SHASTA room  
The popularity of the various yoga and Pilates classes has created a boon in the attendance in these classes, and numerous requests have been made for a consistently warm and quiet environment conducive to relaxation and meditation.
- **SECOND AEROBICS ROOM** – Large room w/ linoleum flooring 2200sq ft  
There is a great need to accommodate the various fitness levels throughout the day. Presently, only light or moderate exercise classes are offered at the most popular times of day. Adding a second aerobics room will allow more classes of wider variety for the more athletic and vigorous resident at concurrent times. The room would also accommodate tap dance, ballroom dance, spinning cycle classes, and other higher intensity aerobic classes.
- **SOCIAL NODES** – Placing small areas with seating throughout the facility will provide social nooks for residents to rest and enhance enjoyment of their fitness experience. Such small nodes will also provide for 'separation' of certain areas of the fitness floor.

**SAUNA** – between men's and women's rest rooms in Sierra room larger space, this would be a small, lower heat, redwood, glassed upper wall structure. There have been a large number of requests for a sauna.

- **OFFICE – FITNESS SUPERVISOR 12x16**  
Currently the Fitness Supervisor and the Aquatics Supervisor share an office. This office is ideal for the Aquatics Supervisor as it looks out over the pools at Del Valle. Having separate offices allows for more efficiency in daily operations and privacy in staff management for both the Aquatics and Fitness staffs.

## **D. Garden Club Plans June 2010**

- 1) Install a backup emergency water supply. Remove and replace all schedule 20 pvc.
- 2) Correct and maintain tree growth and shading.
- 3) Continue with the roto tilling and provide weed whacking service to the club.
- 4) Pave the driveway and parking area.
- 5) Install an electronic gate.
- 6) Continue with security guard early morning and evening visits.
- 7) Install two large bins along the driveway for manure and wood chip storage.
- 8) Develop the designated area to a size sufficient for our purpose.
- 9) Install adequate picnic tables and other seating.
- 10) Install a greenhouse, and related access road and utilities.

## **E. GRF Golf Advisory Committee Long Range Planning Ideas - 9/13/2010**

- 1 The geese are a major detraction and health hazard to walkers, players and to our course. Institute concerted efforts including a resident dog to encourage the geese to nest elsewhere.
- 2 Completion of the Creekside three building complex including restaurant, pro-shop and meeting facilities. Add air compressor shoe cleaning station. Complete maintenance equipment storage and care facilities.
- 3 Completion of restaurant facilities for resident and guest use. Resolve restaurant operator area of responsibility; food, bar and catering.
- 4 The new club house should include improved technical systems and equipment to simplify operation and provide better data and funds collection. Possibly including on-line tee time booking, credit card payments, point of sale data entry etc. Continued technical investments for efficiency as the technology improves.
- 5 Increase rental cart fleet to support normal demand and special tournament activity

- 6 Promote more outside organization golf tournaments and banquets in conjunction with the new Creekside. Expand Director of Golf's ability with CEO approval to accept additional outside tournaments on four weeks notice.**
- 7 Institute realtor program to highlight golf amenity to potential new owners with member-guest play opportunity. Incorporate Club response to web site generated golf inquiry. Provide golf promo piece for distribution to guest players for every outside tournament.**
- 8 Promote and support Club efforts to expand course use and revenue potential for non-peak demand periods such as afternoons and late day activities on a group basis.**
- 9 Institute full fee guest rounds availability in conjunction with one or more nearby hotels**
- 10 Upgrade restroom facilities on the Dollar course to meet health codes. Consider adding fixed or mobile snack and drink facility at tenth green area.**
- 11 Continued budget support for Blake's program of long term course maintenance and scheduled annual, biennial and other periodic services to maintain and improve the quality of our golf courses.**
- 12 GRF landscaping provide improved screening between golf course and common areas including the Dollar clubhouse picnic and parking areas to mitigate conflicting uses and increase safety of persons near the golf course.**
- 13 Redesign Rossmoor website to emphasize golf and tennis amenities attractive to potential new owners in the active boomer generation. Involve a professional marketer to provide a comprehensive product packaging program. We should be promoting Rossmoor golf as the key amenity it is to prospective owners, who will buy for the active lifestyle and grow into using the full spectrum of amenities available. The best way to lower the cost of golf on the coupon is to attract more owner golfers.**
- 14 Continue Special Committee to promote Sunday and Holiday tournaments to increase guest and member play when course is lightly used.**
- 15 Install golf cart lanes on the major roads around the golf courses; including Rossmoor Parkway, Tice Valley, Golden Rain Rd. and Stanley Dollar Dr., between Rossmoor Parkway and Tice Valley. Consider adding specific cart parking areas at Creekside, Dollar and Gateway.**
- 16 Consider lease/rental cart rental package for members as alternative to having own cart: will also improve cart availability for outside event use and reduce cart use on roads within Rossmoor.**
- 17 GRF Capitol project to support long term effort to eradicate Kikuya grass from the golf course.**
- 18 Extend safety fencing at driving range across West boundary of driving range.**

- 19 **Improve the driving range and other facilities for practice and teaching support.**
- 20 **GRF capitol plan for bridge replacement and cart path update for both courses in a safe and aesthetic manner.**
- 21 **Transition golf courses to more drought resistant grasses and other landscaping adjustments that require less water**
- 22 **Review, update and implement the previously designed comprehensive professional plan for Tice Creek, in order to solve all water runoff, drainage, erosion, flooding, bridges, culverts, and water capture and storage issues.**
- 23 **Investigate opportunity for using recycle grey water for course and landscape watering with EBMUD**
- 24 **Drill new water well to supplement creek water for use on course if cost effective.**
- 25 **Modification to some course bunkers to improve playability for seniors and reduce maintenance costs.**
- 26 **Incorporate golf opportunity in any full scale Rossmoor marketing program.**
- 27 **Consider adding lockers and changing rooms for men and women golfers in new pro-shop facility to be added at a future date.**
- 28 **Convert pro-shop area in Social building to original meeting room design with adjustment to accommodate a dinner meeting of at least 200 people**
- 29 **Establish contingency plan for practice facilities to replace current when the Event Center is constructed on current practice site.**
- 30 **Investigate opening Dollar course to normal play on Mondays when no outside tournament scheduled.**
- 31 **Involve Rossmoor Golf Clubs in providing event support services such as fore caddies and rules officials for outside events.**
- 32 **Investigate National Golf Course Owners Association membership as source for comparative course operations metrics and benchmarking.**
- 33 **Expand the items for sale in the pro-shop to include clothing and equipment for other active sports such as tennis, table tennis and Bocce ball equipment.**

## **F. Pickle Ball Club by letter of February 24, 2009 as below**

### Option #1

Need more courts and Sierra auditorium can accommodate two courts very easily. If PB pay is granted for the Sierra then we would like the same set-up as Tice Gym. They have holes drilled into the floor to accommodate poles that can be sued for APB or badminton. The holes have a

plate with a flop that allows the holes to be open or closed when not in use. They are not a hazard at all. This would be perfect for winter play. If the current GRF budget can't afford the equipment (holes drilled, poles and nets) then the club can supply temporary supports for the nets and hopefully it can be put on the following year's budget. We would also need the boundary lines painted for the two courts which I assume the Rossmoor maintenance can accomplish, as they did some lines on the outdoor PB courts on tennis court #2 recently.

#### Option #2

In summer a lot of players prefer to play outdoors and our only option in Rossmoor is one court and obviously that is not enough. Currently there is only one PB court that is lined and that is tennis court #2, but we are only allowed to play on certain days and hours. We would like to convert tennis court #2 into three or four PB courts. This would allow 12 to 16 players utilizing one tennis court! Definitely an improvement in utilizing the space for more resident usage. This option is more costly and would be more reasonable to be done when both Courts #1 and #2 are scheduled for re-surfacing in the future.

### **G. Tennis Club** by email of April 2010 as below

The items which the Board developed in somewhat in rank order:

Resurface Creekside Courts

Widen, re-orient Buckeye Courts and put low fences between pairs of courts

Build 2 new courts at Buckeye

Water fountains on each court

Clubhouse at Buckeye with kitchen and bathrooms

Lighting at Buckeye

Gas barbecue at Buckeye to replace the charcoal one

Awnings at Buckeye and Creekside courts

Restroom at Creekside

Permanent awnings over tables and chairs at Buckeye (currently the tarps have to be replaced every few years as they rip in the wind, etc.)

## H. Table Tennis Club –

July 2010

Playing area:	National Tournaments	40 ft X 23 ft
	National league/Representative matches	33 ft X 16ft 6 in
	RTTC recommended	39 ft X 18 ft
Lighting:	World Championship/Olympic games	1000 lux (92.9 foot candle)
	International/National tournaments	750-1000 lux (69.7-92.9 candles
	RTTC recommends	90 foot candles at table, 75 foot elsewhere; indirect lighting

Flooring: International use specialized sport flooring such as Taraflex made by Gerflor. Table tennis red to contrast with blue tables. RTTC recommends Taraflex.

Room temperature: 60 deg F to 70 deg F. Relative humidity 40-50% with ventilation to prevent condensation.

Wall Color: Contrast with floor and tables. Non-reflective and painted with a dark color up to 8 ft. Above 8 ft, the walls should be a light color. No windows in walls.

Ceiling Height: Current club ceiling is 9 ft. RTTC recommends 12 ft.

Other: gathering area adjacent to playing tables for spectators seating, meetings, storage, etc. Depending on location, could possibly use existing restrooms.

Preferred location: lawn area adjacent to the existing modular building to save developing new parking area.

9/13/10

A P P E N D I X H

TASK FORCE SUGGESTIONS TO  
CONSIDER IN DEVELOPING AN  
OVERALL MASTER PLAN FOR  
GRF FACILITIES



## APPENDIX H

# TASK FORCE SUGGESTIONS TO CONSIDER IN DEVELOPING AN OVERALL MASTER PLAN FOR GRF FACILITIES

Considered in a fiscally responsible manner to maintain a premier adult community.

### **Hillside**

1. Master Plan long term uses of Hillside Clubhouse and surrounding grounds:
  - a. Determine if this is the right venue for pickle ball facility vs Del Valle.
  - b. Consider replacing grass lawn bowling greens with artificial turf.

### **Del Valle**

1. Master Plan uses of Del Valle facilities, including parking:
  - a. Consider short term and long term options to expand the Del Valle Complex.

### **Creekside**

1. Continue to review the Master Plan for Creekside as adopted by the GRF Board and approved by Walnut Creek to meet the changing needs of the community.
2. Consider reconfiguring the overall facility to provide for expanded restaurant, bar and kitchen facilities.

### **Dollar Clubhouse**

1. Master Plan uses of Dollar Clubhouse and grounds:
  - a. Update Dollar Clubhouse.
  - b. Elevator for improved access.
  - c. Upgrades for ADA accessibility.

### **Gateway Clubhouse**

1. Update multi-purpose rooms, arts and crafts rooms and other special use areas.

### **MOD**

1. Update buildings and grounds as needed.
2. Expand parking.

**Garden and RV Areas** where individual residents have exclusive use of land

1. Maintain miscellaneous facilities such as lots, buildings, infrastructure, etc.

### **Golf Course**

1. Update restrooms.
2. Repair golf cart bridges.
3. Continue to transition to drought tolerant landscaping.

**Golden Rain Foundation**

**General Plan**

**OCTOBER 2016**

APPENDIX H: TASK FORCE SUGGESTIONS TO CONSIDER IN DEVELOPING  
ONE OVERALL MASTER PLAN FOR GRF FACILITIES

**Buckeye and Tee House**

1. Master Plan area for tennis, golf and parking (Completed).

**Valley wide**

1. Master Plan long term management of valleywide land and facilities regarding:
  - a. Open space and trails.
  - b. Entry gate and other facilities for security, access and usage determination.
  - c. Traffic flow and control issues.
  - d. Alternative energy projects.
  - e. Address creek erosion issues, on and off the golf course (creek drop structure).
  - f. Develop 10-year Public Works Maintenance Plan.
  - g. Consider food service options at all venues.

A P P E N D I X I

I D E A S O F F E R E D B Y I N D I V I D U A L  
R E S I D E N T S



# **APPENDIX I**

## **IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

Received as of September 15, 2010 and roughly organized to correspond to the topic chapters

### **VISION**

4/02/10 The Long Range Planning Commission.

Thank you very much for the long service you have donated to our cause. We appreciate the effort you are making and the poise and grace you have shown under pressure. Thank you all.

I have a few items that I hope can be addressed and I feel will be good for our community. I list them in order of how pressing I think they are.

IMPORTANT ISSUE: Recently a friend and fellow Rossmoor resident \_\_\_\_\_ made the following statement to me. "The current GRF mission statement refers to Rossmoor as a 'senior adult community' which opens the door for resource use, and program development in assisted living and other health support services."

"Mission statements of Oakmont Retirement Community in Santa Rosa, Stonebridge Retirement Community in Pleasanton and both Sun City Retirement in Roseville and Lincoln, CA (all major competitors of RM), describe themselves as "active adult communities" which creates the resource use and program base for active living programs--golf, fitness centers, etc. This is the issue the Planning Committee is wrestling with. Do we want an "active " retirement community or a "senior support service" adult community?"

We definitely want and I thought we had and 'Active Retirement Community.' I think this definition needs to be a part of our 'Mission Statement,' don't you?

7/16/2010 5:54 pm

My vision for Rossmoor is a beautiful, up to date environment that supports the active life style of senior residents. I envision an evolving community that is changing with the times so that residents remain a vital part of public life. I envision a community where we can afford to add and upgrade facilities to meet emerging interest and needs.

7/17/2010 7:41 pm

Being a new resident her Nov. 2009, I would like to thank you all for the outstanding job you all have done. Nancy and the board members did a outstanding job. I was very impressed how David Early moderated the meeting and keep it on tract.

Having been on boards in my work life and private life is a lot of work. You give a lot of your time with very few notes of you did a great job.

I was very happy to see the responds on the list after the break. Rossmoor is a great place but always needs to move on to the future in order to have keep going. It cost money to succeed for the future.

It is less costly then having are existing homes most of had prior to moving to Rossmoor. Thank you all for your hard work.

4/22/2010 1:52 pm

Sheldon Solloway made an impassioned plea yesterday that the LRPTF not forget Rossmoor's long tradition of supporting the religious needs of Rossmoor residents. He cited sale of Rossmoor property to churches (St Anne's specifically), putting up a creche in December, providing facilities to religious groups for services. I do not know if GRF charges religious groups for use of its facilities. I would hope so. Otherwise, they should be providing equally free facilities for the Atheists and Agnostics Group. Similarly, what costs did GRF incur by display of the creche, besides electricity for the lighting.

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### **IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

My first objection to satisfying Mr. Solloway's request is that examples he provided were specifically Christian. I saw no Menorah display in December, in spite of the fact that there is a large community of Jewish residents here. I have seen no overt acknowledgement of Muslims, Buddhists, or Hindus, although I am confident that there are Rossmoor residents hold those beliefs.

My second objection is that I am an atheist who firmly believes the world would be a better place without religion. If prominence is to be given to Christian displays, then equal prominence should be given to all religions as well as to those who oppose religion. In the case of atheists, one such display was put up in the Illinois State Capital in December 2008, a sign saying:

"At this season of The Winter Solstice may reason prevail.

There are no gods, no devils, no angels, no heaven or hell. There is only our natural world. Religion is but myth and superstition that hardens hearts and enslaves minds."

Personally, I think religion, like politics, ought not to be a part of the General Plan. But if it is decided that it should be, then lack of religion should receive equal time. I don't think you really want to get involved in a discussion of what such "equal time" might constitute.

On 5/18/2010 at 10:22 What does the younger potential Rossmoor purchaser want?/not want?

A very informative newly published full 2010 Del Webb Baby Boomer Survey findings can be found at: [www.dwboomersurvey.com](http://www.dwboomersurvey.com) be well

8/6/2010 8:57 am

I watched it on Ch 28 today. Good show. Only a few comments Vision statement

I think the vision statement needs something about diversity. At the very least it should mention that we have very significant economic diversity that is reflected in terms of housing costs. This is something that all boards need to (and mostly have been) considering in their decisions.

It would also be nice if it also mentioned racial and ethnic diversity.

Rossmoor is still getting more diverse and it's been a while since my life was assumed to be a caregiver but Rossmoor is still very different than the Bay Area as a whole. That can't help with marketing.

### **ENVIRONMENT AND SUSTAINABILITY**

1/27/10 1 charging stations for electric cars

list of topics No date

**#3** GRF to develop a **"Solar Energy Policy"** in which the advisability of allowing

Residents to install solar panels is permitted and encouraged, but of course

Requiring regulation / approval process. In situations where the mutuals and homeowner's associations would have final say, GRF would make known

Its approval and encouragement and guidelines to those mutuals and associations.

**#4** Provide for a **"once a month" Hazardous Waste** (or once a quarter) disposal pick up in coordination and collected by the county's existing Hazardous Waste disposal program.

Arrange to have a County vehicle come to Rossmoor to accept hazardous waste on a once a month basis. This would be a "central location pick up" not a manor by manor sidewalk pick up, and would be for non-electric appliance hazardous waste, (paint, cleaning agents, fluorescent bulbs, mercury items, batteries, Etc.)

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January 6, 2010 suggested lease/purchase of solar panels.

20 Nov 2009 14:53:38 -0800 Planning for a Future Rossmoor

Here are a few electronic enhancement ideas for your consideration.

If more are needed, please let me know.

More "green" – LED lighting, solar panels, replace old heat/air cond.

17 Nov 2009 08:47:14 -0800 Suggestions for Long Term (or short) Planning

Most younger seniors are energy use conscious. While Rossmoor is ideal to use energy efficiency, little effort has been made to do so. For example, lighting should be movement activated and solar panels placed on the flat roofs we have so that heat can be collected for Rossmoor use and sold back to PGE.

6/25/2010 at 2:27 pm

Thank you for responding. I want to document my observation from the 6.23.10 meeting that the LRPTF work focuses on a core theme which you may want to consider - the concept of "Sustainability & Viability".

Many of the LRPTF report recommendations identify GRF areas to re-visit value for services, financial stability, environmental integrity of GRF Trust Assets, and renewal of Trust Governing Documents e.g. "Sustainability".

"A Sustainable (GRF) Rossmoor" represents the LRPTF-designed blueprint for "Long-Range GRF Viability". "A Sustainable (GRF) Rossmoor" represents GRF planning both Mutuals and residents will hopefully welcome. The sustainability and viability theme will be attractive to potential, new, younger residents/investors in improving our mutual real estate, bringing new revenue for GRF projects.

"Sustainability" does NOT imply GRF business as usual. "Sustainability" relies on best business practices, GRF must be evaluated and scrutinized as an on-going GRF Board and management priority.

In a brief discussion after the meeting, Tom Fryer mentioned he liked the "Sustainable (GRF) Rossmoor" theme as well.

Thanks to each of you on the TF for your due diligence on behalf of GRF, Mutuals, and residents, both current & future. Will see you at 6.30.2010 meeting, be well.

### **OPEN SPACE AND LANDSCAPING**

2/12/2010 3:40 pm To: B.W. Research

Sorry, I was too late with the completed survey, then I found that the telephone contact was closed by the 5th. I hope you can still give consideration to this: :

A valley - wide policy that protects spectacular views. In other words, selecting trees of modest height to be planted near , and in front of , residents' decks

( This refers not only to aesthetics , but also, to property values.) Thank you

7 May 2010 10:17:56 -0700 Task Force Members -

It was unfortunate that Warren was not at your last meeting as I heard several misconceptions regarding Rossmoor's landscape program. As the Landscape Coordinator for my Mutual I work frequently with Rich Perona, the Landscape Manager and various contractors. These are the facts as I know them.

Rich Perona is a recognized expert in Northern California. He walks every Entry each Spring with a tree service contractor. They determine what work needs to be done, estimate costs, set priorities. The amount of work done is often severely limited by the Mutual's budget. (Need for staff time on a tree inventory -1000's of trees??)

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Rich stays current on drought tolerant plant varieties that are also deer resistant. Again Mutual budgets come into play. Most Mutual's will not make the commitment to landscaping necessary to replace plants solely for drought tolerance.

Landscaping on the golf course is the responsibility of Golf Course Grounds Manager Blake Swint. Beautification is lower priority than course conditions.

Area along the creek is under very strict control of State Fish & Wildlife. What is often seen as 'a mess that needs to be cleaned up' is viewed by them as critical habitat for hundreds of species from microscopic to our geese, deer, etc. They will severely limit any changes including tree trimming and erosion control.

Rich submitted rehabilitation of the Dollar Clubhouse to the Board last year. It is one of the things they could not afford to do in 2010.

Contrary to public beliefs, GRF Managers are very well versed in their fields. They are up-to-date on new practices and products. One example is pesticides on the golf course. Blake and Mark Heptig have reassured us that they use the safest products available and as little as necessary. (As a volunteer golf course blue bird box monitor, I need that information to insure bluebird health. The birds are thriving.) Again, I applaud your diligence on your herculean task. I would encourage you to continue to question the appropriateness of your consultants suggestions. His knowledge of Rossmoor is still limited. Go to GRF staff if you need more facts. Keep your Plan suggestions generic as the world will be soooo different in 10 years. Thank you so much for continuing to solicit residents' input.

7/19/2010 12:24 pm Dear task force members:

Being a new resident to Rossmoor (bought my unit last fall and moved in about a month ago) all aspects of life here are still fresh and impressionable for me.

I am sorry that I was unable to attend the LRPTF's town hall meeting last Saturday but wish to make a proposal for the long-range physical improvements for you to consider.

I have two suggestions, neither will cost very much:

**One** is the planting of shade trees at parking lots, especially the Gateway parking lot. It is the first major facility one sees and the sight is either a large expanse of asphalt or a lot of cars, not very attractive. Cars parked there during the warm weather months get very hot. The way this parking lot is laid out with 60-degree angle parking makes it very easy to modify. The backing-out distance between angled stalls needs less space; the driving lane, being one-way, can also be narrower than the two-lane required for the 90-degree parking. We need only to re-stripe the stalls and remove paving and sub-grade for tree planting holes.

**Two** is the provision of some play areas. I met a few residents who complain that when grandchildren visit there is no place for them to play. All we need is a few small patches of grass and sand areas, even within or next to the picnic areas at Dollar and Hillside. Expensive play equipment may not be necessary. The new theory on imaginative play recommends simple apparatus: some light weight cubes, for example, that children could stack and arrange so that they could climb or hop or do whatever they wish; some water, a few pails and some sand; etc.

I will be more than happy to volunteer my services as a landscape architect and urban planner; I could draft plans for any improvements that you wish.

Telephone call to Nancy Bann

Interested in good utilization of open space and development of trails. Current trails could not be used by most residents because of terrain, including slope. He had not thought about developing some trail area for average resident. Bann told him about the question on the survey concerning development of walking paths and connection to trails outside of Rossmoor. He is a member of the Trails Club and will discuss open space utilization and trail development concerns with them.

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4/26/2010 9:30 pm Long-Range Planning Task Force

My understanding is that there is time

scheduled at the end of the meeting for resident's comments, I plan to speak on this at the May 5th meeting. At your suggestion I contacted Dan Schrantz for a copy of the OPEN SPACE INVENTORY (April 2010).

A few years ago when the last housing construction was completed, the developer donated the remaining undeveloped land to GRF. This, added to all the previously undeveloped open spaces, yields approximately 710 acres. These open spaces contain Riparian Woodland, Oak Woodland, Brushland and Grassland Savanna. There is an abundance of wildlife and over 120 species of birds have been spotted at least once in the valley.

Though I am involved in other open space activities in Walnut Creek and elsewhere, I am interested in this topic as a resident of Rossmoor. I have asked the Rossmoor Trails Club for support in discussing this topic and have been authorized to speak on their behalf. The Trails club enjoys the use of the open spaces on the perimeter of our valley with its existing network of hiking trails. We are fortunate to share a border with the Las Trampas Regional Wilderness and East Bay Regional Park District. One can hike from our valley, through the Open Space and then directly into Las Trampas. I have shared our interest with Bob Carlton of the Nature Association.

It is important to ensure that the open spaces remain open space. I am hoping that the Long-Range Planning Task Force recommends that GRF develop an Open Space Policy that will prevent any further development or inappropriate use of those areas. Restoration and Native Plant propagation efforts could make excellent volunteer opportunities for Rossmoorians.

"Open Space land is any parcel or area that is essentially undeveloped and devoted to an open space use for the purposes of the preservation of natural resources, the managed production of resources, outdoor recreation, or public health and safety." (California Government Code 65560(b))

Below is a section of the Vision Statement from the City of Walnut Creek's Vision and Principles in the 2006 General Plan for 2025. Such a statement may well proceed a policy developed by GRF.

"The Vision sees Walnut Creek (Rossmoor) as a city (community) that:

Preserves and manages the integrity of the natural environment and vistas, including vistas of and from the hills, and protects and expands access to natural resources, trail, parks and creeks that surround and connect the community."

Where we go from here depends on the Long-Range Planning Task Force's reaction to the subject. I would like to invite all residents with an interest to be prepared to speak up and raise the topic to the discussion/study level. Thank you

July 17, 2010

I question the clearing of hillsides of leaves and other vegetation.

Why not allow vegetation to decompose and enrich hillsides?

The resulting earth cover will require less irrigation- conserving water.

There could be added mulch on barren hillsides.

Stop artificial land management.

Is compost ever added to barren hillsides ( Off Terra Granada entry 19 and the areas next to the golf course)?

7/23/10 Water – ENV-XX -Conservation

This should be an action item. To get a better handle on water usage – Install meters in strategic places to record usage. This may be a capital expense – but well worth it. The reasons are obvious.

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### FINANCE

February 17, 2010 Answers to late survey essay questions by female, born 1919. Did not check an opinion on value of GRF portion of coupon but stated need for better money management by professionals- not amateurs- How many cities of 10,000 population are run by amateurs?

February 16, 2010 GRF coupon is ok value: Repair existing structures- replants lawn areas- replaces dead shrubs & redo sprinkler systems – fill in holes in streets – replace damaged metal street covers.

Date: February 2010 To: Ten Year Planning Task Force

Following are some ideas, comments, suggestions, and questions regarding issues in Rossmoor that I would like to share with you.

#### Ways to Save Money

Save energy by replacing single pane and metal windows with double pane windows or adding storm windows. Insulate existing doors or install storm doors or replace with double pane insulated doors.

Save water on the golf course by cutting the rough less often in the hot summer months.

The price of planting a tree is more than the tree will cost during it's lifetime – water, trimming, leaf removal, and pick up of droppings, etc. Are there existing guidelines other than those established by Walnut Creek for tree planting? If not, establish guidelines to determine when a tree is needed and plant on that basis rather than choosing to plant when a tree is wanted.

1/27/10 Bundling of home owner insurance

Received On An Unknown Date:

1. Can GRF develop a “**Master Purchase Program**” to purchase certain Items in Bulk to cost savings benefit of residents? (Residents would Pay GRF for items) For example compact fluorescent lighting items, Selected hardware items, group rate insurance policies for homeowners Contents. In mutuals not where owners are not insured through the mutual, Explore methods by which groups of owners can purchase insurance at a lower cost. When I was at John Muir I instituted a program By which a large number of physicians purchased their malpractice Insurance as a group, paying one premium. We saved 20% on premium, And over the years I was there saved over \$3 million for the group. Could Rossmoor take advantage of our “group purchasing power” in a Number of similar ways?
2. Investigate if it is possible to vest the current **Defined Benefit Pension program** for employees currently in that program, and then freeze that program and all Rossmoor employees going forward participate in a 401-K program, including Union employees. The Defined Benefit Program could be the single biggest Financial liability facing GRF- Rossmoor on a long term basis.
3. Should Rossmoor have its own “**Tree Service**” given the magnitude of the forest Of trees we have?
4. GRF should investigate having its own **501-C-3 charitable** donation program by Which residents can contribute funds to the benefit of the Rossmoor community.

4 Mar 2010 10:06:04 -0800 My comments on Financial Topics

The following notes are intended to memorialize the comments I made during the Residents'

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Forum at the March 3 Task Force meeting.

The vision or overview section of the General Plan will contain many lofty objectives--which I support. However, they all cost money. Thus, I encourage the Task Force to include in that section a commitment to operate Rossmoor in Fiscally Responsible manner. Other words you might use include "prudent," "conservative," or "economically sound."

The financial statement in the previous plan refers to "affordable and cost effective." I interpret that sentence to mean the residents feel that they are getting appropriate value for the money they pay to live in Rossmoor. That is a worthy goal, but it is separate and distinct from the equally important need to run the affairs of Rossmoor in a fiscally responsible manner.

My concern is that a future Board might want to move aggressively on something like alternative energy or providing new services to residents. Those initiatives may be desirable, but they need to meet the fiscally responsible test.

The Finance Committee recently discussed the question of whether or not it was appropriate for GRF to maintain a Reserve Fund. It is a complicated topic that I would be happy to discuss at the appropriate time. Note that Reserve Funds in the Mutuals is a very different issue.

7/16/2010 5:54 pm Finance,

I have grave concerns about our long term financial well being. This concern is based on our continued participation in a defined benefit program for employees. This responsibility is hugely expensive which is why most companies have moved away from this type of benefit. Rossmoor has taken only a token step toward addressing the issue by eliminating it for new hires. This burden will plague us for many years unless further steps are taken to transfer younger/medium length employees to a defined contribution plan.

2/24/10 Re: Long Range Plan

Foresee gov't entity effects on Rossmoor and its residents:

- RE taxes, parcel taxes, etc., city taxes

- Permits for manor work – restrictions and costs

- Mandates: table tennis portables, green & carbon, below ground storage tanks?

- Creek riparian rights, seismic upgrades

License fees: pets, home business

Economy effects

- Retirement income levels threatened, Wall Street

- Definded benefit insolvency

- Tax rates, means testing

- Inflation, dollar valuation vs other currancies

- Borrowing interest coasts

- Social Security & Medicare insolvency or benefit reduction

- Healthcare costs, Sr. Advantage

- Reverse mortgages

- Underwater mortgages

- Liens placed by Mutuals for back coupons

Demographic survey, anonymous, financial status

Another Task Force for government & economy effects

Seismic survey, building susceptibility

Little earthquake insurance in effect

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### **IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

15 Mar 2010 Re: GRF Reserve Fund Question

There is no document that gives the full discussion on the topic of reserve funds for GRF. It was discussed by the Finance Committee about a year ago, and the conclusion of the committee can be described as follows.

The GRF Operating Budget is normally controlled by the CFO to keep a cash balance of at least \$1 million at all times. While that money is not segregated into a separate "reserve" account, the funds are always available to be used in the event of an unexpected expense. The amount of available cash is reviewed monthly by the Finance Committee and the GRF Board. Currently the cash balance is over \$2 million. Thus, the effect is that a cash reserve is being maintained for use in the event of unexpected requirements.

The issues are quite different when you think about the GRF Trust Account and the need for reserve funds. The Trust Account has a regular inflow of cash from the membership fees--on the order of \$2.6 to \$3 million per year. Even in the severely restricted real estate market last year, we took in \$2.7 million. Part of those funds are committed to paying off the debt on the pool enclosure, the corporation yard, and Creekside. However, there will probably be at least \$1 million per year of uncommitted cash coming into the Trust. Maintenance of trust facilities is paid out of the coupon, under the terms of the trust. Thus, the \$1+ million per year is available for new or unexpected projects.

An alternative logic regarding reserve funds for the Trust arises because the trust is currently borrowing to fund capital projects. We could borrow an additional sum of money and set it aside in a "reserve fund." However, we would pay 6% interest to borrow while receiving less than 0.1% interest on the reserve fund. The bank would make money, but it wouldn't be good for Rossmoor. Because the Trust has a reliable flow of cash coming from the membership fee, banks are anxious to loan money to the trust. Thus, if something happened that required a major expenditure of Trust funds, we should be able to borrow the additional money at that time. In summary, setting aside a reserve fund for the GRF trust is unnecessary and uneconomic. I hope this is helpful.

8/6/2010 8:57 am

I do think we need more "fee for use." Lots of reasons pro and con but basically if something is seen as 'free' people will advocate for new facilities more than they would if they thought they had to pay for at least part of it. I don't think the "efficiency" argument is particularly valid, especially if we're thinking long term. The technology for collecting small fees is well developed and not particularly expensive.

Feb 16, 2010 2:54 pm Subject: Revenue enhancement idea

This is a suggestion to look into a promising technology from [www.Clearwire.com](http://www.Clearwire.com) that provides internet and voice services by wirelessly linking the home to an antenna.

Several years ago the GRF board heard a presentation from a communications consultant about a plan similar to the one that was proposed for installation in San Francisco by Google. Wireless Internet access is a good idea but as it turned out the technology was not robust enough - too many antennas and the inability of the wireless signal to penetrate walls.

Clearwire has developed a technology that responds to the earlier deficiencies. A single antenna covers a wide area and the modem provided to the customer allows the radio waves to penetrate walls.

Some thoughts:

1. Clearwire is in the process of opening up the bay area to their service - including Walnut Creek as well as San Diego, Sacramento and Los Angeles.
2. A proposal to build an antenna on an elementary school property on Ygnacio Valley Road was recently proposed but turned back by local residents - Not In My Back Yard syndrome (NIMBY). The school would have received \$15,000/year.
3. Comcast, is the sole provider of cable Internet cable-based Internet service here in Rossmoor. Download speeds are "promised" at up to 16 Megabytes per second but they rarely exceed 4 MBPS. Internet phone service on the other hand is currently provided by: Comcast, Vonage and AT&T. Clearwire would provide a competing technology for speed and cost of these services.
4. Clearwire's website indicates that their service has been rolled out in many US cities providing some

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degree of assurance that the service is viable and cost effective.

Clearwire may provide a reasonable and cost effective Internet service to Rossmoor. I recommend that this service be investigated.

Date: February 2010 To: Ten Year Planning Task Force

Following are some ideas, comments, suggestions, and questions regarding issues in Rossmoor that I would like to share with you.

GOLF COURSE REVENUE Increase 18 Hole course play as follows:

Tee Times for Men's and Women's 18 hole Golf instead of shot gun when there are fewer than 40 players and on non regular tournament days. This allows regular play to begin after 1 ½ hours rather than 4 or more hours. Women golfers follow the men's field on Wednesdays and men follow the women on Thursdays.

Additional 18 Hole golf tournaments as follows:

Golfers love to compete. The Men's 18 Hole Golf Club already has a full tournament schedule of approximately 60 tournaments a year to manage as well as outings and events. Similarly, the Women's 18 Hole Golf Club already sponsors many golf tournaments, outings and events.

Would it be possible to have additional Pro Shop sponsored events as follows in order to increase play to increase revenue? Or Establish a "Special Tournaments Golf Group"? Perhaps the Golf Advisory Committee could make a recommendation of how to handle these additional revenue producing tournaments.

"Twilight Tournament" twice a month rather than once a month (Turn out for this tournament has been good – approx 160 golfers on average).

Couples Sunday Tournament of the Day for those couples who would like an 18 hole tournament format. Use tee times between 10 and 12 (presently not a popular time to play so would not impact regular play). Pumpkin Pairs Tournament turn out has been good so this idea could catch on to increase play. A small number of these Sunday tournaments could be set aside for players to invite outside guests.

Mother's Day 18 Hole Tournament – Mom gets to play golf with children and grandchildren or Mother/Son or Mother/ Daughter Tournament - Added bonus – golfers get to socialize with other golfing families.

Father's Day 18 Hole Tournament - Dad gets to do same as above

Memorial Day Tournament – Invite outside guests to play – Dinner or Social after.

July 4<sup>th</sup> 18 Hole Tournament – Shotgun to coincide with other GRF festivities – Invite outside guests to play

Labor Day 18 Hole Tournament – Invite outside guests to play - Dinner or social after.

Additional Monday Golf Tournaments for outside groups

Additional Monday Charity Events

OTHER REVENUE

Golf guests pay to play. Appoint a committee to determine guest use of all facilities. How often is the same guest using any one facility? Charge guests using facilities a fee? If so, discover a way to collect the fee or limit the guest use of any one facility to a determined number of times per month. If so, how do we keep track? Have a Rossmoor volunteer at each location?

Dollar Clubhouse Revenue-

Appoint a committee of retired, volunteer resident architects, interior designers, and decorators to determine the possibility of redecorating and refurbishing the clubhouse by having and Interior Design Show house. Guests purchase tickets to view clubhouse rooms and must wear a

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guest badge. For security purposes, off- site parking only. Guests come into Rossmoor by bus and are dropped off and picked up at a designated location near Dollar. See Facilities Section – Dollar Clubhouse for design possibilities.

Date: February 2010 To: Ten Year Planning Task Force

Following are some ideas, comments, suggestions, and questions regarding issues in Rossmoor that I would like to share with you.

There has been conversation regarding the marketing of our community. It also has been proposed that a Marketing Director be hired to do this job. Further conversation should continue in this regard. Perhaps the best approach might be to give the job to a committee of volunteer retired marketing professionals.

Received On An Unknown Date:

1. Develop the **“GRF-Rossmoor Brand”** – sort of a Good HouseKeeping Seal of Approval, or “Underwriter’s Lab Approval” or Better Business Approval, By which various vendors, (service companies, contractors, lending Institutions, etc.) are subjected to review/scrutiny by an approved entity Of GRF, and determined to be properly licensed, of clean record, etc. and Deserving of GRF seal of approval – for which such vendors pay an Annual fee to GRF.

2. Investigate income potential of **Bio-Mass** produced from Rossmoor’s trees, lawns, Etc. – including firewood –

#### **3. Rossmoor Rental Service**

Do you occupy your Rossmoor Residence 100% of the time, 75%, 50%?

Do you rent your Rossmoor Residence when you do not occupy?

Are you interested in renting your Residence when you do not occupy.

Can GRF establish a residential rental service, charging a % of rental income as fee for service.

4. A number of mutuels prohibit renting for longer than a one year period, or for a cumulative period of more than 12 months during time of ownership. I know of owners who violate this ruling. Perhaps owners who wish to rent for longer than 12 months could be permitted to do so but pay a **“Rental Permit Fee”** to GRF to allow this. In this way, GRF would know how many renters are in Rossmoor vs how many owner occupiers.

5. Many manors are occupied by only one person. Each manor is allowed two occupants who may have access to Rossmoor’s facilities, (pools, gym, golf, etc.) Perhaps these single occupant owners could designate a single other person who could use that “extra” **user privilege** and that designated person could pay GRF an annual fee for such use.

6. **Golf** – as the number of golf days has decreased we may wish to consider concepts by which increased play can occur and resulting in increased income.

7. Outside players (non Rossmoor Residents) by invitation and sponsorship by a Rossmoor Resident be allowed to purchase seasonal passes, annually, but at an increased premium to the rate charged to Rossmoor Residents. The number of these available to be determined by information provided by the Golf Pro so as to avoid overcrowding.

8. Rossmoor Residents able to purchase a book of 10 golf passes which will allow them to bring in a guest, and for each book an 11<sup>th</sup> pass is provided free

9. Times of very slow play, as identified by the Golf Pro, made available to outside players accompanied by a resident at a lower fee.

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January 6, 2010 suggest investigating GRF having its own real estate office

Wed, 24 Feb 2010 23:20:26 -0800

I agree with you that we should charge an appropriate fee for occasional guest usage of our fitness and recreation related facilities. in the same way that we permit guest usage of the golf course and driving range. this is consistent with my suggestion that we consider resident sponsored associate membership privileges for non residents who are somehow connected to or have a strong continuing (and otherwise healthy) interest in Rossmoor. Implementation and administration would be easy. we would not have to cross the line into the cash handling business. we could use the token system (ah la the driving range) for the occasional user and an annual fee with id card system for associate membership.

February 24, 2010

Consider investigating the possibility of charging guests for use of Rossmoor facilities.

There seem to be two different types of usages:

Group 1. The outsider club participant who adds to the general wear and tear of our carpets, upholstery, occupies scarce parking spaces, etc. but attends functions that are not space limited. These participants often may not even have a relative in Rossmoor.

Group 2. The outsider who is using highly expensive to operate and/or maintain and/or space limited facilities, such as the Peacock Hall movies, fitness center, pools, lawn bowling, golf courses, etc. Usually this usage is when the outsider is accompanied by a resident.

It makes sense to me to consider charging a significant daily visit fee to those in group 2. However, it does not make sense to charge a significant daily fee for group 1 (club participants) yet there should be some contribution to support of the "keeping fresh" of these facilities. Perhaps the club pays a yearly fee \$12 -24, for each member outside? The Rotary Club has had two recent Presidents who did not live in Rossmoor and will have another in about 18 months. I believe the current President of Lions is not a resident. I believe a past president of the RRA was not a resident as possibly was a past president of the Men's golf club. There have been several outside members of clubs that I belong to who eventually moved into Rossmoor.

So perhaps usage by non-residents in the context of some club and organization usage is generally beneficial to Rossmoor and counteracts the wear and tear on facilities leaving the real issue of guest user fees to the group 2 users.

### **FACILITIES**

Copy of handout from Town Hall meeting 7/17/10

The Drama Association of Rossmoor was formed a year ago by some of us who are very interested in live theatre and felt there was a need. That need was confirmed in no time, thanks to excellent publicity given us by the Rossmoor News and community enthusiasm.. In just a few months, our paid membership blossomed to more than 400 members.

What we suspected was confirmed. Rossmoor has a lot of residents who have experience in being in plays from high school on up, others who would like to take a few classes just to see

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what it is like and still more who like to read plays together or attend productions in the area.

Our steering committee of volunteers, headed by longtime actress Jean Wilcox, has provided such a range of activities. We have one big limit on morphing into our long range goal of actually producing plays and hosting performances here by visiting theatre companies. Rossmoor does not have a stage theatre. We have Peacock Hall, an excellent movie house, and the Sierra Room at Del Valle, but neither is adequate for staging plays. We make do with what we have and are grateful for the cooperation of the Recreation Department. Our dream, however, is to produce plays on the premises that would be in quality facilities that would be available for other purposes as well.

We are aware that the proposed event center in the Tice Creek development would contain a stage. We hope your master plan recommendations would encompass obtaining a professional consultant skilled in theatre design as an adviser in this project. While we recognize that an event center by its very name covers a variety of uses, these are options to meet the drama association needs:

The traditional proscenium stage. This has the advantage of good backstage areas, possible fly-space for scenery and footlights.

--The thrust stage, with the audience on three sides.

--Lighting. Needs to be adequate lighting on stage and so-called "house lighting" as well.

--Sound. This is particularly critical in retirement communities like ours, where some hearing loss is developing. It should include sufficient speakers and sufficient microphones. None of Rossmoor's halls are noted for quality acoustics, for speaking or music.

--A sound and light board booth.

--Backstage. Dressing rooms and storage space. An intercom system is needed to connect backstage with the sound and lighting booth.

--A ticket booth at the entrance to the event center.

Obviously, varying price tags would apply to all of these furnishings. We look forward to working with you and the Golden Fain Board.

Summary of points in hard copy letter dated April 15, 2010

Continue capital improvements.

Fitness is too small

Sierra Room is a gym with poor acoustics so events center needed

Table tennis needs a new home

Keep making Rossmoor competitive.

5/14/2010 5:51 pm

I recognize the difficulty getting golf course cost comparisons on an equal basis but I think you should offset the Rossmoor course costs by an allowance for the cost to maintain the lawn bowling facility. Somewhere in the past I heard that cost was comparable to maintaining the greens for a nine hole course. Dare I guess that could reduce your \$33.27 figure below by 1/5-1/6?

LRPTF: April 2010

At the Tennis Club Board meeting yesterday, we brainstormed about tennis in Rossmoor in future years. To answer your question about the viability of tennis in the community, I can confidently say that tennis is a growing activity. We currently have 216 members in our Club and there are many others in the community who play, but are not affiliated. Our

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club is very active with 15 tournaments a year, exchanges with other senior communities, social events at Buckeye, league play with teams from all over the Bay Area visiting and playing on our courts and heavy use for clinics, lessons, practice and play at Creekside Courts. We have a policy of signing-in when taking a court to play on and attached is a document which shows the court usage at both Buckeye and Creekside Courts.

It seems appropriate to outline some recent past history to lay the groundwork for our current wish list. About 4 years ago, the Tennis Club proposed to GRF that major work needed to be done to Buckeye Courts. Dan Schrantz visited the Moraga Country Club with Ken and me, so we could show him what a quality tennis facility looks like. Those courts have low fences between pairs of courts for the sake of preventing errant balls from entering the other court and catching the players unawares. What we were suggesting is that low fences be placed between each pair of courts at Buckeye and, to accomplish that, the courts had to be widened to keep them regulation sized. Safety issues were the driving force behind this request. At the same time, we were requesting that drinking fountains be placed on each court. Currently, there is one drinking fountain at Buckeye on the outside of court 3. The result of our proposing, planning, and urging was that the Corporation Yard mandated project used all of the available monies. All 6 Buckeye Courts were resurfaced, cracks were not repaired, no low fences for the sake of safety of players were created and no installation of water fountains occurred. So, it will be no surprise that these same items appear on the current list.

There are 2 aging, decrepit tennis courts know as Creekside Courts which are located on Rossmoor Parkway. These courts are sorely in need of resurfacing and have been in such need for many years. They are currently used for ball machine practice, backboard practice, pickle ball, paddle ball, tennis instruction and singles and doubles social play. At one point, Dan Schrantz asked me how I would prioritize the low fence and court widening need at Buckeye and the resurfacing of Creekside Courts. I told him that was unfair, because both should be mandated as projects that needed to be done.

With that background in mind, here are the items which the Board developed yesterday.

They are somewhat in rank order:

Resurface Creekside Courts

Widen, re-orient Buckeye Courts and put low fences between pairs of courts

Build 2 new courts at Buckeye

Water fountains on each court

Clubhouse at Buckeye with kitchen and bathrooms

Lighting at Buckeye

Gas barbecue at Buckeye to replace the charcoal one

Awnings at Buckeye and Creekside courts

Restroom at Creekside

Permanent awnings over tables and chairs at Buckeye (currently the tarps have to be replaced every few years as they rip in the wind, etc.)

It is difficult to explain these items in this format, but I would be most agreeable to

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taking a field trip to the courts with you and the task force. It will then become very clear, how the future should treat the tennis facilities at Rossmoor.

Thank you for considering our requests and for your foresight in grappling with these issues for future residents of our community.

4/10/10 To the Long Range Planning Commission

It is our understanding you have been charged with the responsibility to provide input to the GRF Board related to GRF owned and managed facilities within our community.

GRF boards along with staff, current and future, must concentrate on amenities. It would be good to increase the size of the Fitness Center because we need more equipment and space. There is no more room to add the needed machines and there is no room for floor exercises, spinning classes or Pilates classes.

We need to build a multi-use Event Center that could stage theater events, musical events, dance events such as ballet and ballroom competitions, speakers, arts and crafts and more.

The original design for the Creekside Golf Shop should now be undertaken while prices are still low so that we can realize the savings. As it turns out the project should not have been staged in the first place. We think the Golf Shop should be started before the General Contractor completes this phase demobilizes to avoid paying for re-mobilizing the job.

It is time to rehabilitate the Hillside buildings and to rehabilitate the Dollar clubhouse to make it handicap accessible with better meeting rooms while preserving the building's architecture.

The unsanitary, non-accessible restrooms at the seventh tee of the Dollar Ranch golf course and the restrooms at the Buckeye tennis courts need to be replaced with something built to current code for public restrooms and is accessible to handicapped people per ADA. The current restrooms have concrete block walls, with bare concrete exposed aggregate floors. It would be more cost effective long term if all the public restrooms including the ones at the dollar picnic grounds/ bandstand and the seventeenth tee, had the floors tiled or epoxy coated and the walls tiled or covered with sanitary board or epoxy coated at minimum.

The ongoing erosion problems with the creek at the fifteenth tee and at the culvert under the seventh fairway should be analyzed by a civil engineering firm, a design developed and then executed so that this worsening problem is resolved. The current state of problem erosion is only going to get worse and become more expensive over time and could result in the destruction of the large Oak tree at the seventh fairway bridge. A knowledgeable engineering firm needs to be brought in to look at the entire length of the creek throughout Rossmoor and asked to recommend a comprehensive solution to the erosion and flooding problems, bridge overflowing issues etc. There are property values and life styles to protect.

Rossmoor now and in the future continues to compete with other active retirement communities. Location and our golf course and facilities are our big advantage. Allowing our amenities to stagnate or deteriorate will diminish the advantage of our location.

Attached was a list of over 70 names.

4/15/2010 11:32 am To the Long Range Planning Task Force:

Rossmoor must remain competitive as an "over 55" community. To do so, it is imperative that capital improvements be made without excessive delays. The new Creekside Complex is one of those areas. Despite the effects of the recession on some of our residents, I feel that the time to act is now that construction costs are somewhat depressed.

The Del Valle fitness center is too small and looks like a sardine can on Friday mornings when I am there to observe it.

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The Sierra Room was never meant for cultural events; hence, the acoustics and lay-out are inadequate at best--perhaps more accurately, they are farcical.

Living in Rossmoor is like being on extended vacation at a wonderful resort. However, the amenities and activities must keep pace with demands. As younger and more active seniors are sought for residency, we cannot afford to stagnate. The expression, "You have to spend money to make money," might be appropriate.

8/6/2010 8:57 am . Creekside master plan

It's mentioned but not defined. What does it mean? Is it a euphemism for the third rail of Rossmoor politics...the event center?

5/9/2010 8:08 am

Lots of people are wrestling with the problem that on one hand our higher cost amenities require financial contribution from all the residents to stay viable. On the other hand, people don't like paying for things they don't use. Mel broached the idea of making "amenity credits" transferable between members. Basically, each residence would continue to pay a monthly amount toward amenities. That would no longer get them unlimited usage. Just to take some of our higher cost amenities as examples, we pay around \$45 per month per residence for golf, pools, fitness center and buses. The cost of each visit to the fitness center is around \$4.50, so the monthly fee would cover 10 visits. Pools are around \$8.00 per visit so 5 visits would be covered.

If a person was a power user, they could buy credits from another member. There would be a market price developed, probably under a dollar per dollar credit. Members would be expected to handle this independently on line. GRF could also sell credits for a dollar per dollar credit. (Keep in mind our members 10 years from now will have had 10 years more computer experience on the average.) This would require smart cards (\$2.00 each) and card scanners.(\$170 each) and a modification to the Trust. There would also be some expense in setting up the credit transfer software.

The most frequent objection I've heard is that it would be difficult to implement scanners in some facilities, but it doesn't have to cover every amenity. Nor do many facilities need gates. One benefit might be that more attention would be paid to costs. Some of the per-usage costs of those four items seem out of line. Please correct me if the figures below are significantly wrong.

Submitted by the Fitness Center Advisory Committee:

Fitness Center: Renovated in 2001

- 3300 Residents Work With Trainers
- 1000 Residents Work Independently
- Cardiovascular equipment, weight machines, 120 classes per week
- Annual visits have grown from 57,411 in 2000 to 137,565 in 2009 (58%)
- Average annual growth is 6.4%; growth in 2009 was 12.4%

Long-range needs identified by Fitness Center Advisory Committee include computerized access to the facility, additional parking, sauna, expanded floor space for varieties of exercise activities and equipment, additional space for specialty programs (e.g. yoga, aerobics, resident consulting rooms), office space for staff and fitness supervisor, indoor walking/running track and storage for aquatics/fitness/housekeeping supplies.

5 May 2010 21:05:38 -0700

At the Long Range Planning Task Force meeting this afternoon, Nancy Bann made a statement that "we have not received any info from table > tennis". As president of the

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Rossmoor Table Tennis Club, I wanted to respond but I could not stay for the Resident Forum. For your info, I made a proposal to the GRF Board on August 28, 2008 to pull table tennis out of the Creekside Master Plan and to have instead a free-standing facility at Hillside. We even had a schematic design attached to our proposal. The Board approved our request in December 2008. Their subsequent action plan calls for (a) working with the City of Walnut Creek to extend use of the leased table tennis trailer through 2011; (b) Proposing to the City either that the existing building remain on a permanent ongoing basis or that a new modular building be installed at the Hillside Clubhouse area for table tennis use. Let's not forget that table tennis is now the last remaining displaced unit from the condemned Junior Dollar Clubhouse in Creekside. Warren Salmons is very much aware of our needs and he is prepared to ask the GRF Board this fall for authorization to proceed with designing of a permanent table tennis facility in Hillside. We too have a Planning Committee and have offered its services to Warren whenever he needs them. As far as I know, nobody from your LRTFG has approached us for information concerning table tennis. Therefore, I was puzzled by Nancy's statement. I do not have Nancy's email address and would appreciate it if you can forward this to her. I will be happy to answer any questions on the above.

February 2010 To: Ten Year Planning Task Force

Following are some ideas, comments, suggestions, and questions regarding issues in Rossmoor that I would like to share with you.

Dollar Clubhouse Interior -

Update, redecorate and refurbish the clubhouse. Appoint a committee of retired, volunteer resident architects, interior designers, and decorators to evaluate, make recommendations, and approximate costs.

Suggestions for Updating Dollar Clubhouse:

Attached is a copy of the Dollar Clubhouse floor plan (not included here). With a few changes to rooms 5, 7, 8, 10 and 34, the new purpose for each room would accommodate additional persons per square foot and would increase circulation of persons from room-to-room during a large gathering. There are of course other possibilities, but these suggestions are intended to start the dialogue.

Room 5 becomes a South Parlor Sitting Room. It presently seats only six or eight but could seat twelve or more. The furniture could be moved to accommodate small dining tables.

Room 7 remains flexible and will accommodate either additional dining tables or other set-ups depending on use. The Piano would be a welcome addition to this space.

Room 8 becomes a welcoming North Parlor Reception Room. It presently only seats 4 persons. It could accommodate 11 people on a day-to-day basis. With the rearranged openings, the room becomes more appealing due to its open feeling. Relocate library books to a different Dollar room or donate to main library as pointed out on Page 53 of the May 29, 1997 Rossmoor General Plan.

Room 10 presently only seats 12 persons but could seat 36 persons when converted to a dining space with a serving bar located in the bay window. It is closer in proximity to the kitchen and patio than Room 7. With light from windows and the view to outside, it makes for a more pleasant dining experience.

Room 34 (Balcony Area) becomes casual seating with bistro tables and chairs.

When Dollar does not have a scheduled first floor booking and with the addition of snacks, beverages, magazines, newspapers, Dollar casual seating groupings could be as inviting as the Redwood Room at Gateway.

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Consolidate and relocate all Dollar historical information to a designated space. Honor the past but live in the present looking forward to the future.

Picnic Area behind Dollar Pool and Clubhouse -

The metal benches are uncomfortable and difficult to get in and out of. Replace metal benches with comfortable all-weather dining tables and chairs.

Remove gravel and install pavers or other substance that promotes ease of walking and better access for walkers and wheel chairs.

Remove temporary bandstand platform and install a gazebo-like structure

Hillside Buildings -

Update Building Interiors

Evaluate need for acoustics

Hillside Pool -

Repair and increase size of pool deck and provide shade in the area next to the trees at the rear of the pool area. The additional space is needed to accommodate family guests and children seeking shade. There are many days when it can be too windy to use the umbrellas. Can a eating area be designated to the rear of this section to accommodate families with grandchildren?

Fireside Room -

When the main room is used for dining events, the acoustics are not suitable. Decrease the noise level by installing floor to ceiling non closing (dummy) drapery panels and some acoustical panels on walls.

Sierra Room – Delle Valle -

Ditto and need to consider a lighting alternative.

20 Nov 2009 14:53:38 -0800 Planning for a Future Rossmoor

Here are a few electronic enhancement ideas for your consideration.

If more are needed, please let me know. Technical assistance re: phones, TV, computers, etc. available to residents

1. Computerized kiosks with schedules, information, help, would be nice
2. "Community TV" setup as for watching football in the Oak Room or outdoors
3. Computerized library catalog, processes

4/1/2010 1:41 PM

Keep up the good work!

I think it's great that you are coming in under budget, and I can hardly wait for the projects to be completed.

Please don't forget about improvements to the fitness center; I am a regular early morning user, and I often wait for machines at 6:30 in the morning.

My wish list includes the event center; I know it is unpopular with many but I believe that if we are to keep Rossmoor from becoming an "old folks home" we need to keep improving.

If my 70 years has taught me anything, it is that you can't stand still--things here will either improve or decline. Lets make Rossmoor state of the art.

Thanks.

4/1/2010 1:56 PM Dear Long Range Planning Task Force:

I believe that it is essential that Rossmoor remain competitive as a Senior Citizens Community. In order to do so we must continue capital improvements such as the new Creekside Complex. I realize that the national economic situation is not the best but we should use it to our advantage as we are at Creekside.

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The Fitness Center is too small for the number of users, the Sierra Room is not adequate for entertainment due to the deplorable acoustics and the Table Tennis Club will eventually need a permanent home. All need to be addressed.

Rossmoor is lovely and a very desirable place to live. We have wonderful amenities and many and varied activities. Let's keep it that way.

4/1/2010 9:05 AM Dear Commission Decision Makers,

As a resident of Rossmoor, I am disturbed by the negativity being espoused by those Rossmoorians that want to cut back on improving our community. One of the main reasons my wife and I choose to live here is our golf course, and the other activities that are available to us. These things and our location provide a lifestyle that is comfortable, and affordable.

While we feel a moral responsibility to help those less able financially to live as comfortably as they wish (and we do), we also understand that Rossmoor is not charity, and should not become a "Section 8 type of Housing Project" as it seems some would prefer. I understand that it took nearly twenty years to get the Creekside project started, and now it is being constructed with considerable compromise...no event center, etc...etc. We would urge the Long Term Planning Commission to ignore the nay sayers that are attempting (whether they know it, or not) diminish our property values, and lifestyle.

Now is the time to build, and expand, not cut back. Yes the monthly coupon increases, which we don't like, but it is our understanding that "Capitol Improvements" are paid for from "Transfer Fees". Please look forward to planning a positive future for Rossmoor.

4/1/2010 10:45 AM

There seems to be a recent trend among small, but vocal groups (like the let's keep the Dollar pool a bath tub for a few) in Rossmoor to encourage a reduction in spending on Capital Improvements.

I am not sure what has caused this concern among some residents, but I suspect it is the constant bickering at the Board level about these improvements. I can only assume the thinking is, " let's just sit here - an old community of old people" - while others are building new communities with great amenities for seniors, ie Stoneridge Creek in Pleasanton, and others. I have a considerable investment in Rossmoor, both in my condo and my life.

I think I can safely say that there are a large number of us who want to see Rossmoor stay up with the times, and expect our Board of Directors to lead the way to making sure Rossmoor remains a viable investment, and a great place to live.

The Long Range Planning Task Force has a serious responsibility to give the Board the information to insure the long range future of Rossmoor.

3/31/2010 4:48 PM

I'd like to commend the work that this committee is doing. Rossmoor needs to take a step back and look at what we all envision our community to look like in the future and that means capital improvements.

Many of our facilities are deteriorating and inadequate and planning is needed to keep Rossmoor up to date and enjoyable for all of us and for prospective residents in the future. Keep up the good work.

3/31/2010 4:49 PM

Please don't stop improving Rossmoor, especially in these economic times when it is cheaper to build. I participated in a focus group, and the most requests were for new facilities. I make good use of the Fitness Center - it needs more room!!!

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We must keep up with the times - Baby Boomers are our future. Please don't make this into an old peoples' home. Change must always continue, or what you love will die. We love it here, but it must continue to be an up-to-date, "happening community". Thank you for Listening,

3/31/2010 5:22 PM Dear Friends,

It bothers me to read in the Rossmoor News the negative comments from a small group of grippers who do not appreciate the good and important work that you hard-working volunteers are doing. That is what has prompted me to write and express my appreciation for your significant efforts.

At this time, my wife and I are completing our first 25 years as residents in our beautiful Rossmoor valley. We have lived in our manor here on Ptarmigan Drive longer than any other home in our long and happy marriage.

Over the years I have had an opportunity to serve our community in several different capacities including being a member of the GRF's Trust Properties Committee and the Founding Chairman of its Communication Advisory Committee. I also have had the privilege of serving six years on the Board of Mutual 48, including being elected its President more than once. I have also had the pleasure of service as President of several Rossmoor clubs, including the Chrysanthemum Club, Duo Club, Garden Club and the Community Club.

The reason I mention these activities and my years of living in Rossmoor is that one might incorrectly conclude that here is another of those "old-timers" who just want to maintain the status quo and not spend any more money on capital improvements. On the contrary, I definitely do not want to be tossed into that negative group. I very much appreciated all the various facilities that were built by others before Gwen and I arrived here. That is why I know we must continue to add to and upgrade our clubhouses and sports facilities, not only for our present enjoyment, but also to attract future residents to move in and occupy the manors that we eventually will leave behind.

I think the GRF Board was so wise in contracting to construct the Creekside Project when they did.

Today's tougher economic times meant that we all benefited from the lower construction cost than was originally projected for that very necessary addition to our facilities. I urge all of you on the LRPTF to continue to thoughtfully and economically plan for the next steps we must take so that our beautiful community does not age and fall behind those outside competitors that would rob us of our leadership and cause the values of our manors to drop like a lead balloon! Thanks for what you are doing to plan the work so we can then work the plan!

3/29/2010 4:52 pm

Just to let you know that I hope that your long range plans will include

- 1) a new Club House to be built to better serve our Rossmoor Community and
- 2) enlarge the Fitness Center at Del Valle.

Thank you for your efforts and good work.

3/29/2010 4:01 PM

Capital improvements are essential to the continuing health of the Rossmoor community. I endorse intelligent design and implementation of projects that make this community the superior place it is in which to reside.

3/29/2010 2:37 PM Long Range Planning Task Force

First, thank you for the hours being spent in regards to the Long Range Planning for Rossmoor. This October, it will be 6 years since moving to Rossmoor, from San Francisco

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and I have not had any regrets. The location, landscaping, facilities, the variety of architectural choices and floor plans makes Rossmoor exceptional. We are constantly giving our visitors the grand tour of Rossmoor with reactions of disbelief that this is not a private club!

I would like to encourage the Long Range Planning Committee of Rossmoor, not to lose sight of the most critical factor, that Rossmoor, as with any community or private homes, must continue to work on maintenance and capital improvements. With Stoneridge Creek in Pleasanton, another major retirement community soon to be completed, it is imperative that we remain competitive!

4/6/2010 3:26 pm Long Range Planning Task Force: Capital Improvements

It has come to my attention that there have been very negative mailings to you about capital improvements in Rossmoor. In my opinion that is very short sighted thinking. I am on the young side for Rossmoor. What attracted me to it was the fact there was so much to offer active people and that Rossmoor seemed to keep up with the times and the needs of more active adults as well as those less active. With new "state of the art" facilities soon to open close by, it is important we keep up w/ capital improvements to stay competitive and "attractive" to the baby boomers that are coming to an age of consider a retirement community. I guess that is what I am trying to say. I think of Rossmoor as a retirement community that has appeal to all senior citizens. A place that they can grow old in wonderful safe surroundings. A place in which any activity level can be happy. If we don't pay attention to the capital improvements Rossmoor will deteriorate into a place that isn't any of those things. We need the younger people to move into Rossmoor to renew it and to keep it an active community. Only with capital improvements can Rossmoor be appealing and attract new active residents. We need those people to keep Rossmoor alive. Therefore we need the capital improvements.

We can take advantage of this time. Because of the economy, contract prices are at the lowest they have been in years. Case in point, the improvements to Creekside. Costs there are much lower than originally anticipated. In the long run it will be cheaper to keep things up and/or make improvements than it would be to allow it to just lay stagnant. It's hard to look past the hard times we are in right now. But with careful planning capital improvements would make Rossmoor an even better place to live. It would be a shame to sit back, do nothing and watch our wonderful community depreciate.

Thank you for giving me the opportunity to have my voice heard about this matter.

4/3/2010 2:45 pm To the Task Force:

Life in Rossmoor is wonderful for us and we greatly appreciate all that we have here. It is vital to keep Rossmoor vibrant and fresh, not just for current residents but future ones as well. This means that we must keep up the facilities as well as planning for expansion of facilities. We realize that not everyone in Rossmoor has the financial wherewithal. However, we need to find a way to accommodate long time residents in need while looking ahead. Our fitness center, which we use, needs to be expanded.

We need a real event center.

There are more things, but we will leave it to the Task Force to outline these based on your hard work. Thanks to all the members of the Task Force for taking the time to deal with these important issues.

4/3/2010 10:48 am

I understand you are receiving a lot of letters encouraging you to forget about improvements to Rossmoor. I write to encourage you to pursue improvements. It is financially prudent in these times to expand the fitness center and provide for a better room than Del Valle Sierra Room for large group dinners and other gatherings.

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The Boomer Generation will be retiring and looking for communities that encourage their keeping active. The same voices that fight improvements today complained when Gateway and the Del Valle complexes were built, and now everyone enjoys them.

4/1/2010 4:30 pm

When I moved to Rossmoor twelve years ago I was impressed with the ambiance and vitality, evident in all the activities available to residents. And, as with all progressive communities, endeavoring to improve the quality of life for everyone.

To me Rossmoor offers and continues to offer benefits and improvements for an active adult community. I know that the Long Range Planning Task Force will seek out ways to improve and expand our options, taking in consideration of course, the monetary effect upon our budget.

The Creekside development has been a controversy for many of our residents, but I'm sure when it comes to completion, they will understand and realize what a great asset it will be not only be for current residents but an added enticement for prospective buyers.

If the Board decides to purchase more fitness machines, the suggestion of incorporating the Sierra room to expand the fitness center would seem to be a logical move.

However, I know there are many clubs and groups who use this facility but hopefully they could be accommodated in the new Creekside rooms. >

4/2/2010 11:51 am To members of the long range planning task force.

I think that i am speaking for the silent majority of Rossmoor residents when I urge you to continue the policy of keeping Rossmoor the prime retirement organization in California. Our hilly location is not suitable for assisted-living elderly, and our many facilities are geared to active seniors. Long range planning has made possible the wonderful facilities we have now. Resident satisfaction is high. We shall be needing a new events center in the near future.

4/5/2010 11:33 am Members of the LRPTF,

Claudia and I want to make clear that we would very much like to see an expanded fitness center at Rossmoor with floor exercise space and more fitness machines that are less crowded. We realize that this will gym expansion will probably need to occupy the Sierra Room. The Sierra Room has been the major venue for dances and dance parties, as well as large gathering for the Sirs and so on. It has bad acoustics and was originally a gym if we have heard the history correctly. This makes one of our major needs more pressing and interlinked. That is the need for an event center that can handle theatre, ballet, dinners with dance bands and dancing. In general a good event center should be able to handle a range of events, in fact anything that may come up in the future. We should plan this with a eye to what is needed now as well as what may be needed years from now. Let's get it right and possibly our grand children's grand children will be using it happily in the future.

No Date Provided

When I moved here almost 12 years ago the one thing that attracted me the most was the golf facility here at Rossmoor. I saw the other amenities; the buses, the Fitness Center, the pools, the clubhouses. All very nice . . . but I came here for the golf. Over the years I have used some of the other amenities. I never thought I would need to seek Counseling Office services, but I am now so thankful that they too exist. However, the one amenity that I have used constantly since moving here is the golfing facility. Even when I still commuted daily to work, at the end of the day I would stop down at Creekside and play nine holes before continuing on home for dinner.

All of the above is my way of saying . . .

golf here at Rossmoor is very important. The small amount I pay on my coupon does not

## **APPENDIX I**

### **IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

come anywhere near the amount I gladly pay in daily green fees. Anyone who wants may come down and play on the two courses. They may even bring in their relatives, sons and daughter and grandsons and granddaughters. Our shining star here at Rossmoor is our golf facility. We need to keep it bright. We need to do whatever is necessary to keep it attractive. Don't let coupon considerations mar our shining star.

February 9, 2010

forwarding a suggestion from a GRF Board member to study building a purpose-built, warm water pool presumably adjacent the current Dollar pool location. This suggestion was forwarded without any endorsement by the committee.

20 Nov 2009 14:53:38 -0800 Planning for a Future Rossmoor

Here are a few electronic enhancement ideas for your consideration.

If more are needed, please let me know. Expanded gym services, to include brain training, Wii-type equipment

17 Nov 2009 08:47:14 -0800 Long Term (or short) Planning

Being a four year+ resident, I wanted to make a few suggestions.

We are not attracting enough younger new residents. Partly, this may be due to the economy, but I think it is more particular to what Rossmoor does not provide. While there is a plethora of wonderful programs, few are geared to the active senior.

1. Most in the Baby Boomer generation are involved in physical fitness and attend gyms or participate in sports where there is significant aerobic activity. At Rossmoor, unlike most retirement communities, we do not even have bike lanes on the wider streets, and only a few bike racks. We have no basket ball court, no volley ball court, and only 2 pools (one currently) open for real swimming. Our fitness center offers only one spinning class, 3 times a week at 6:00AM, despite the investment in spinning bicycles. There is virtually nothing in the way of high end aerobic classes, particularly in the mornings, when most active people are still around. The Fitness Center is overheated for aerobic exercise and a few of the tread mills are placed under the skylight which emits a good deal of heat. That's fine for those who walk on the treadmill, but it's too hot for those who run.
2. Most younger seniors have young grandchildren. Rossmoor is not young grandchild friendly. Pool hours (now non-existent) are too limited. There is virtually no area designated for safe play. Most units do not provide storage space for necessary items. I suggest a storage area be made available where residents can place no longer used items (such as cribs, high chairs, toys, strollers...) and they be made available for a small cost to residents. The management of such a place could be done on a resident volunteer, rotating basis.

March 11, 2010, 1:49 PM A Permanent Building for Table Tennis

To all members, from the RTTC Board of Directors

Would you help the Club get a permanent home? Candidates for three openings on the GRF Board are now beginning to seek votes in election districts B, F and G. Election day is May 6<sup>th</sup>. We should inform the new directors about our history and the current temporary status of the Club.

You may take one of two approaches: (1) call them on the phone and give them the info on this fact sheet, or (2) when they knock at your door for your support, invite them in and tell them

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about our Club. In exchange for your vote, ask them to support our need for a permanent facility at Hillside.

NOW THAT THE GRF BOARD HAS TAKEN CARE OF THE CORPORATION YARD PROJECT MANDATED BY LAW AND HOUSING THE SERVICE PERSONNEL IN PHASE I OF THE CREEKSIDE DEVELOPMENT PROJECT, TABLE TENNIS, BEING THE LAST REMAINING DISPLACED GROUP, MUST BE THE NEXT IN LINE AS THEIR HIGHEST PRIORITY ITEM.

The RTTC was established in 1972 for 34 years in the Junior Dollar clubhouse. We became "homeless" overnight in early 2006 when the building was condemned for toxic mold. A temporary set-up in Del Valle was a complete disaster. There was poor lighting and priority was given to social events in the same room. The result was that many members simply stopped playing the game.

The present trailer was leased in October 2006 for \$19,500 per year. It was an improvement and membership doubled. However, the City of Walnut Creek will not allow the substandard trailer to remain after December 2012.

The original Creekside Re-development Plan included two rooms in the social building for table tennis. In December 2008 the GRF Board agreed, at the Club's initiative, to remove table tennis from the Plan and to consider a less expensive, free-standing facility in the Hillside area.

We need GRF Board authorization this fall to proceed with design of the building and costs included in the 2011 Trust budget. The final design needs to be approved by the City of Walnut Creek in 2011. Physical construction needs to begin in late 2011 or early 2012.

4/02/10 The Long Range Planning Commission. URGENT ACTION NEEDED

The nasty, unsanitary, non-code, and non-accessible restrooms at the seventh tee of the Dollar Ranch golf course need to be replaced with something that is built to current code for public restrooms and is accessible to handicapped people per ADA. The current version is bare, unsealed concrete block walls, with bare concrete exposed aggregate floors. These wall and floors are soaked with urine and worse. The path to the men's side is mud in the winter. The sink in the women's side is broken. Both rooms swarm with mosquitoes in the summer. The restrooms at the tennis courts and the eleventh tee and the ones at the Dollar picnic grounds/ bandstand and the seventeenth tee, need to have the floors tiled or epoxy-coated and the walls tiled or covered with sanitary board or epoxy-coated at minimum. The Buckeye restrooms do not conform to ASA accessibility codes.

**EROSION IS CHEAPER TO STOP THAN TO REPAIR** The ongoing erosion problems with the creek at the fifteenth tee and at the culvert under the seventh fairway should be analyzed by a civil engineering firm, a design developed and then executed so that this worsening problem is resolved. The current state is only going to get worse and become more expensive over time and could result in the destruction of the large oak tree at the seventh fairway bridge. A knowledgeable engineering firm needs to be brought in to look at the entire length of the creek throughout Rossmoor and asked to recommend a comprehensive solution to the erosion and flooding problems, bridge overflowing issues, etc.

**OUTDOOR MENTAL HEALTH** I would like to see Rossmoor have a practice fly casting pond that is, at minimum, 16' to 30' wide and 60' long and has at least 30' feet of clear open ground, free of any obstruction at one end and if possible at each end. The depth of the water is no issue as long as it is at least 8" deep. There should be a pathway along one side and maybe benches. This is not for fishing but to practice fly casting. This pond would be used to teach beginning and intermediate fly casting, as well as for practice. It would also be a lovely reflecting and meditation pond. It would be wonderful if a small simple building with lights, heat and restroom could be adjacent to the pond to house fishing clubs and accommodate fly tying benches. At the very minimum the building should be 13'0" x 24'0" of interior space to accommodate an accessible restroom at one end and lockers at the other end. A skylight

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would be nice for natural lighting. I have no idea where this might fit in the Rossmoor valley, but it is not very big or expensive and is a great and relaxing way to spend a meditative few hours with no great strength or stamina required.

**PHYSICAL HEALTH & WELLBEING** If the fitness center could be expanded a bit to allow for floor exercises and a few more key machines it would be a big plus and would enhance flow of one's exercise routines. The gym, while good, is cramped and incomplete in the range of the equipment, some of which is showing its age.

A larger budget and bigger facility for the library would be a boon. Could we consider a bit bigger budget at minimum?

**IN SUMMARY** It is essential that we do not allow the wonderful facilities that we do have to deteriorate for lack of maintenance and necessary upgrades. These are expensive and viable buildings, they represent a major investment in our community, and to allow them to fall into disrepair for want of adequate funding to maintain them would be criminal negligence in my opinion. We owe ourselves and the future of our community a fiduciary duty to not allow this to happen.

5/10/2010 10:10 pm

Discussion of new facilities often revolves around, "Do we need the new facility." I'd like to frame this discussion in terms of "quality of life."

It has been argued that we don't need a new fitness center or event center, just as it was argued that we didn't need the new Peacock Hall, library, Fireside Room, Oak Room and the like. However, the old Peacock room had uncomfortable seats, poor sight lines, and half the seats of the new Peacock Hall. The old Fireside Room required guests to go outdoors in the cold or rain if they wanted to use rest rooms; people using the old library often froze in the winter and sweltered in the summer, and the old Oak Room cost us a great deal in labor costs for set up and take down. These problems were all solved with the new, improved Gateway complex and added immeasurably to the quality of life of Rossmoor residents. Similarly, a new/expanded fitness center and a new event center will eliminate the claustrophobia we experience when we work out and the frustration we experience when attending a function at the Sierra Room..

The fact that fitness center usage has practically doubled in the past two or three years after one remodeling demonstrates the popularity of the facility as well as the need to expand it to accommodate an ever increasing demand. This would eliminate or cut down on the waits for equipment and the feeling that we are in one another's personal space as we work out.

The Sierra Room is dreary and depressing, has miserable acoustics, and lacks adequate parking and cooking facilities. The room looks like what it is: a 65 year-old gym. During dinner, it is almost impossible to talk to one's tablemates when music is playing. There are Rossmoor clubs (especially music clubs) that will not hold functions in the Sierra Room because of its poor acoustics, and the food served is - at best - mediocre. When a function overlaps fitness center and pool use, it is very difficult to find parking.

Over 240 functions are held in the Sierra Room each year, and these range from 56 dinner dances to 52 fun days, to concerts, club functions, mutual meetings, Recreation dances, fashion shows and elections (2). Among the groups that could move to a new event center are Chamber Music, Community Chorus, Music Association, Recreation Concerts, GRF meetings (when needed), and golf tournaments.

Maintenance costs would be manageable and prudent. Coupon costs for all GRF facilities' repairs and upkeep in 2010 are \$9.69 per month, and for custodial services, including offices, the cost is \$10.62. In 2005, it was estimated that increased maintenance costs for ALL of the Creekside project would be \$5.08 per month. Even if the cost were double that, it is reasonable for what we'd get.

I urge you to have a vision for Rossmoor. We want to maintain and improve the quality of life. These projects are both doable and manageable.

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4/7/2010 10:37:45 pm

Thank you for the schedule of the meetings of theLRPTF committee. I shall try to attend at least the one on social and recreational programs. You asked me to be specific about what I'd like to see in the future of Rossmoor. Since I am about to turn 89, my future is limited. I have been completely satisfied with the improvements achieved during my ten years of residence and have supported plans for the most recent construction. I was disappointed that the large event center, proposed from the earliest years of Rossmoor was not included in this present project.

So the number one on my list of future building is a large event center with adequate parking. It will need good acoustics for concerts and lectures. It should also provide adequate accommodations for dinners and dancing. I hope that future planning will include such a facility.

4//2010 7:26:59 pm

You all are doing a good job. As a new resident here the things I hear or read in paper some upset me. Nothing is free, I think people forget what it cost them when they had another house before moving here. Now is the time to move forward to make improvements and keep going with upgrades. This is the only way our values will go up and now is the best time due to the fact building cost and materials are at lowest we will see. Also it would increase sales and increase more people to move here.

4/7/2010 7:10:24 pm

Just want to put my 2 cents in as I think the only people who write letters are the ones who constantly complain and live in the dark ages. I moved to Rossmoor for the Amenities, not my little manor...I had a lovely home in Montclair but I wanted a different lifestyle when I became widowed and quite frankly, I feel like I have died and gone to heaven!!....We absolutely must continue to make improvements and keep expanding what we already have or we will end up with an aging population who no longer things ahead, but only back.( I am part of the aging population so I can say that). I just got an invitation along with a spiffy brochure to come and hear about the new Stoneridge Creek in Pleasanton which will be opening soon and which will be our competitor...we cannot just be stagnant and we need to be out there encouraging the boomers to keep coming. Yes, these are bad economic times but we came out ahead with the new building this year and we do have money to spend but we wont have it if we dont continue to get new people. I can't understand why that is such a difficult concept...So keep at it, folks and dont kid yourself...that is a minority group...the rest of us just don't have anything to complain about and are out having fun... but put out the word and we can write letters too!!! I have sent this to a few friends of mine who i know feel the same. Good luck and keep up the good work....Cheers, Corinne Edmonson

April 6, 2010 9:34:30 PM: Spending Members of the Long Range Planning Task Force,  
First off, we appreciate your serving on the Long Range Planning Task Force.This is a crucial project in the view of those of us who think Rossmoor is as close to Paradise as we are going to get. We also recognize that brickbats fly in such service and that some days, it will seem thankless in spite of the many hours you will spend on it. Let the record show that we do thank you, come what may in your recommendations. We also want to go on record as favoring "reasonable" expenditures to improve Rossmoor's physical plant. This would include going forward with the building that was left out of the current Creekside construction. In the interest of full disclosure, you should know that we are both on the steering committee of the one year old Drama Association of Rossmoor. We

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have 420 paid members and the year has seen a variety of activities provided for them. This includes classes in all levels of acting, 14 groups reading plays once a month in the various homes, visits by professional actors and attending plays outside of Rossmoor at reduced rates.

The one lack is a stage theatre in Rossmoor. We would encourage proceeding soon with a new building that would make up for this lack. DAOR is making do at present with readings and workshops by members at Peacock Hall but we are nearing the point when we will produce full-fledged plays. We think we have shown that the interest in live theatre here is even greater than we had hoped when we started.

As for your direction in general, we believe strongly in budgeting for capital expenditures, not just for our personal interests but to maintain and increase the value of our property in post-recession in the years ahead with other, newer senior developments in the area. We cannot afford to be penny wise and pound foolish.

4/6/2010 9:33:54 pm

Keep improving our beautiful Rossmoor to keep it the ideal place to live for future residents.

4/10/2010 7:30 pm

The letter below, and the attached list of petitioners, express our feelings and suggestions, we sincerely hope it helps your committee in providing input to the GRF Board.

It is our understanding you have been charged with the responsibility to provide input to the GRF Board related to GRF owned and managed facilities within our community.

GRF boards along with staff, current and future, must concentrate on amenities.

It would be good to increase the size of the Fitness Center because we need more equipment and space. There is no more room to add the needed machines and there is no room for floor exercises.

We need to build a multi-use Event Center that could stage theater events, musical events, dance events such as ballet and ballroom competitions, speakers, arts and crafts and more.

It is time to rehabilitate the Hillside buildings and to rehabilitate the Dollar clubhouse to make it handicap accessible with better meeting rooms while preserving the building's architecture.

4/16/2010 12:59pm To The LRPTF

On behalf of the Fitness Center Advisory Committee, attached is the Long Range Plan for the Fitness Center at Del Valle. There are a total of 6 pages.

The FCAC has identified immediate needs that can be accomplished as soon as funding is available. These needs would be invaluable to literally anyone visiting the Del Valle Complex (residents, guests and staff) using existing space.

The Plan also includes the longer range view based on usage statistics, projections, industry standards, studies and programs pertinent to older adult health and fitness .

Note Plan prepared by the GRF Fitness Center Advisory Committee is located in an Appendix.

7/23/10 Facilities – FAC-XX

The large courtyard outside the Starlite Theatre & Fireside Hall – could stand more use. I think a large( tent like) shelter in the middle of the area would help attendance & usage.

2/7/2010 12:23 pm

At the LRPTF meeting of February 3rd I made some observations during the Resident's Forum responding to the one hour presentation made earlier in the meeting regarding Rossmoor Golfing amenities. As my comments were unprepared I would now like to confirm and expand upon the observations.

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Although the presentation provided a good historical summary it failed (in my opinion), to offer our most knowledgeable specialist's (potentially very valuable), advice regarding the LRPTF's primary concern; future development options. Specifically, it would be most helpful if graphical trends could be presented showing the historical annual change in the number of resident and non-resident rounds played and forecast trend lines for as far ahead as is reasonable. Various forecasts could accommodate different potential scenarios.

The presentation reported a continuance of the long-term decline in the number of rounds played by residents and emphasized a "need" to attract more non-resident players. I would like to suggest that the LRPTF seriously consider (and address in the finalized plan), if it is indeed in the best interests of the majority of Rossmoor residents to plan upon the continued operation of an expanding commercial venture within our community.

A repeated justification for accommodating non-resident golfers is said to be that it acquaints golfers, who might otherwise be unaware of Rossmoor, to the golf facilities and thus results in additional property sales. However, when it is considered that only about 15% of residents are golfers then it follows that on average, only about 15% of potential buyers would be particularly drawn by the golfing facilities. This raises a related question for the final report; is such a small potential fraction of retirement home seekers sufficient justification to devote so many resources to the attraction of non-resident golfers?

Expressed differently, and bearing in mind the recent quotation (reference given below) from the Wall Street Journal's MarketWatch;

"When it comes to retirement living, golf courses are out" should not the LRPTF report also address the question; is it appropriate for Rossmoor to plan upon continuing to support a tournament grade course?

Under the agenda item New Business, it was agreed that LRPTF members should visit other retirement communities. In the Resident's Forum I suggested that the Oakmont retirement community near Santa Rosa CA was very comparable to Rossmoor and it would be very appropriate to include it on the itinerary. Reasons include;

- a - the retirement homes are built around the two golf courses
- b - the golf facilities (and associated first class restaurant) are run
  - > by an independent management group
  - > c - all golf course costs are covered by resident and non resident
  - > golfers - not all of the residents
- d - the restaurant is open to all Oakmont residents and guests.

Such a proven arrangement, in a similar community, deserves evaluation as to it's applicability to Rossmoor. Having spent a considerable amount of time at Oakmont I would be happy to share my knowledge regarding it's various amenities and arrangements.

Let me please also take this opportunity to thank LRPTF members for all their work and express my appreciation of the openness to input from residents which is being practiced. (Referenced WSJ web page: <http://www.marketwatch.com/story/a-quick-peek-at-the-retirement-houses-of-tomorrow-2010-01-25?siteid=nwhpf>)

February 3, 2010 repair of restrooms in golf facilities.

Date: February 2010 To: Ten Year Planning Task Force

Following are some ideas, comments, suggestions, and questions regarding issues in Rossmoor that I would like to share with you.

Dollar Golf Course Restrooms -

Restroom located at first hole green:

The approach to the restroom is dirt and when wet, mud. Install a walkway of cement blocks or pavers or fill area with wood chips. If one is walking in dirt and mud, it's

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impossible to keep a clean floor. Windows are missing. Install new windows. Paint interior including floor so that all can be properly cleaned. Replace the rusting sink.

Restroom located at tenth hole green:

Replace sink, mirror and outdated light fixture and paint interior including floor so that all can be properly cleaned.

Restroom Next to the Seventeenth Tee:

Ditto the above.

3/16/2010 Dear Mr Fleck,

It was indeed a pleasure to meet you yesterday for the purpose of discussing my recent communications to the Long Term Planning Task Force and the Rossmoor News concerning Rossmoor's golfing situation.

I was pleased to learn that the Golf Advisory Committee is preparing about three alternative scenarios for future golf arrangements including at least one to reduce the subsidy paid from the coupon of all residents. It was also encouraging to learn that you are actively investigating the Oakmont Villages retirement community's golfing management model and your findings will be reflected in the scenarios.

I presented various supporting charts and spread sheets and will be pleased to provide further copies or additional back-up data if requested. We discussed the generally declining popularity of golf (relevant extracts from a New York Times reference are attached). You kindly undertook to investigate how many of the "baby boomers" (who had recently become Rossmoor residents) were actually taking advantage of the golfing amenity.

We also noted that although non-residents are charged fees for use of the golfing facilities they are not being similarly charged for use of the Fitness Center or the pools. Considering that all residents are issued with a photo identification card, presumably with the intent of controlling non-resident usage of Rossmoor facilities, we wondered why this capability is not being maximized.

I look forward to learning of the GAC's recommendations to the LRPTF of options for consideration and would be happy to provide any assistance.

Thank you for bringing about our meeting.

4/1/2010 11:38 am The Long Range Planning Committee Re: Capital Expenditures

I have lived in Rossmoor for four years and would like to advise the committee that my primary reason for moving here was for the golfing, although I do enjoy many of the other activities offered. I have talked to numerous residents who have moved in recently and everyone remarks about the golf courses.

The team maintaining the two courses have done a remarkable job keeping the them in tip top shape and although that costs money, in my opinion, it is money well spent. I also bring friends to Rossmoor, as well as talk to many outsiders who play in our Home & Home Tournaments and without exception everyone is very pleased with both the Creekside and the Dollar Golf courses.

Please continue to provide the funds necessary so that these courses do not deteriorate, we have two great community assets and they should be maintained so that future generations of Rossmoor residents can enjoy these facilities as we are currently doing.

3/31/2010 1:03 pm

I understand there is much attention being given the golf course and its associated expenses and how they should be paid (increase coupon, decrease maintenance or a combination of both) . Please know that I am a relatively new resident into RM and we would never had considered RM as a residence without the golf course. While RM has many amenities, the top of the list and anchor for RM's property value appreciation is the golf course. Once you begin to cut the operating and maintenance expense you become penny

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wise and dollar foolish.

Our golf course personnel do an outstanding job with the course's maintenance. Any cuts to the golf course budget that would have material negative effect on the course's condition and playability would be a huge mistake. This strategy would prove to be a very slippery slope. If adopted, this course of action would be very difficult to reverse and ultimately cost more.

3/30/2010 1:36 pm

I have heard that your membership has been getting a concerted blizzard of letters in opposition to anything that might look like progress or improvement here in Rossmoor.

These people who only see the negative side of any efforts put forth here in Rossmoor do not represent the majority of our neighbors. They seem to think that if they make enough noise, then they will be seen a larger group than they are.

Keep up with your work, and realize that there are many here who appreciate the work that you are doing, and want to thank you.

telephone call on May 10, 2010.

Forwarding the idea of your fellow residents concerning golf cart parking.

The use of golf carts and providing parking for them has surfaced several times in the Task Force work over the past 14 months. The Task Force has draft recommendations about golf carts, including supporting existing roadway sharing with golf carts and providing additional parking options.

16 June 2010

#### A CASE FOR REDUCING RESOURCES DEDICATED TO ROSSMOOR GOLF OPERATIONS

INTRODUCTION: Over the last ten years, resident utilization of Rossmoor's golf facilities has decreased by 25% in terms of the number of rounds played and in the same period guest utilization has increased by 22%. This situation has had the following substantial negative effects:

- increasing the proportion of the coupon and other physical resources being used for the advantage of non-resident golfers.
- not releasing fiscal and physical resources for alternative uses which would be of more benefit to non-golfing residents.

Consistent with the reduced resident golf demand this report develops an alternative to the current golf operations plan. The approach could be adopted henceforth and/or incorporated as a case within the Long Range Plans.

BASIS: Actual historical data has been used to create the charts and a neutral computer program has been used to generate the trend lines and forecasts.

This report is a development from the Golfing Trends report distributed on 8<sup>th</sup> April 2010, in particular it is based upon the following significant past and future trends:

- Decreasing utilization of the 18-hole course.
  - *Increasing utilization of the 9-hole course*
  - Increasing preference of resident golfers for the 9-hole course.
- Decreasing total usage (declining utilization of resources).

(For reference, charts showing these trends are included).

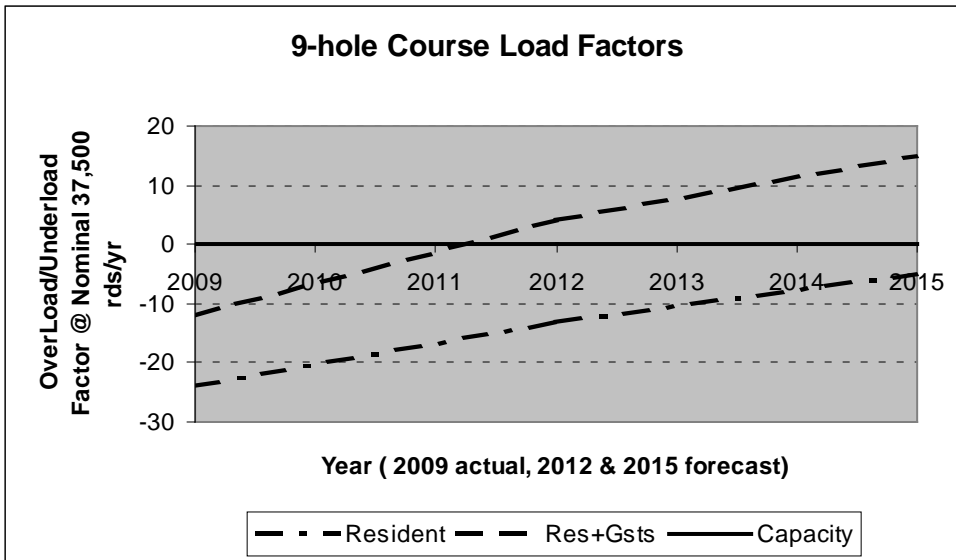
## APPENDIX I IDEAS OFFERED BY INDIVIDUAL RESIDENTS

The fundamental significant convergence between resident and non-resident use of the Rossmoor golf courses is represented on the following chart:

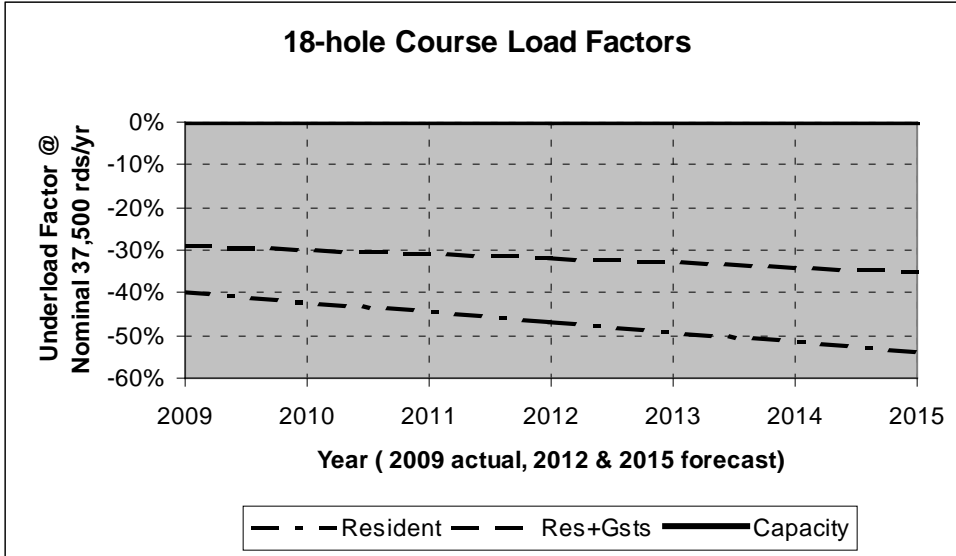
This report is also based upon the following premises:

- The recent and current resource underutilization situation is being primarily addressed by measures designed to attract increasing numbers of non-resident golfers.
- The declining number of resident rounds played suggests that non-resident play has not resulted in more golfers becoming residents of Rossmoor.
- Neighboring golf courses achieve significantly larger utilization factors than Rossmoor's stated nominal capacity.
- Physical and fiscal resources dedicated to golfing are not available to the approximately 85% of residents who do not play golf.
- Other prospects for resource usage (which, collectively, would probably benefit more than 15% of residents) are being identified in the new Long Range Plan.

**COURSE LOAD FACTORS** Load factors for Rossmoor's 9-hole and 18-hole courses are shown on the two following charts. They represent both 2009 usage, and forecast 2012/15 demands at the current stated nominal annual capacities of 37,500 rounds per course, per year.

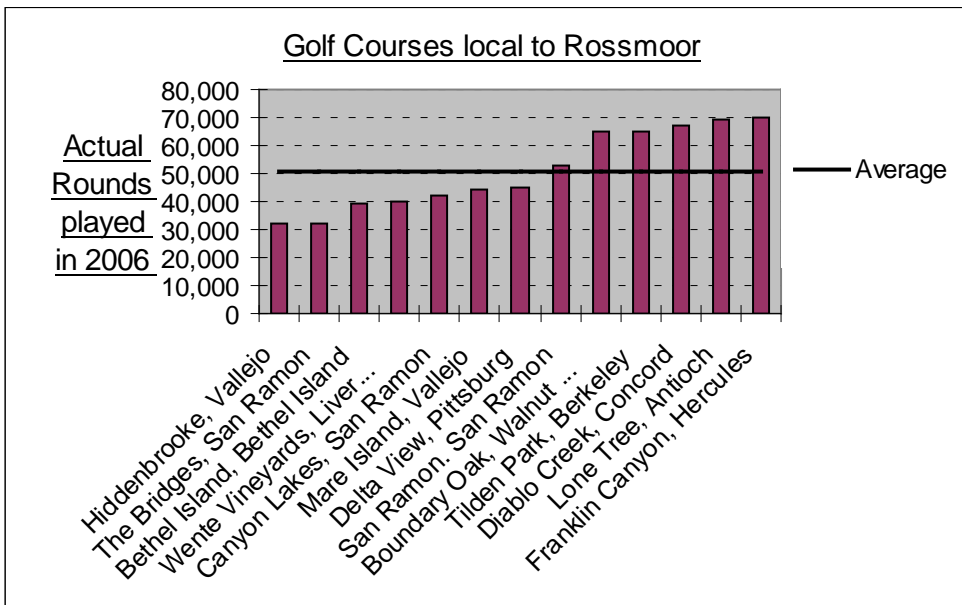


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- if current nominal capacity remains at 37,500 rds/yr per course, and
- if resident and non resident play continues to change at the current rates

then these charts show that by the year 2015 usage will be further unbalanced, the 9-hole capacity will be 15% short of capacity but the 18-hole course will have 35% surplus capacity. **POTENTIAL COURSE CAPACITIES** In 2007, Economics Research Associates of San Francisco conducted a study for the City of Walnut Creek providing data for golf courses in the vicinity of Walnut Creek. The courses are identified on the histogram below, showing the individually achieved, and average use.



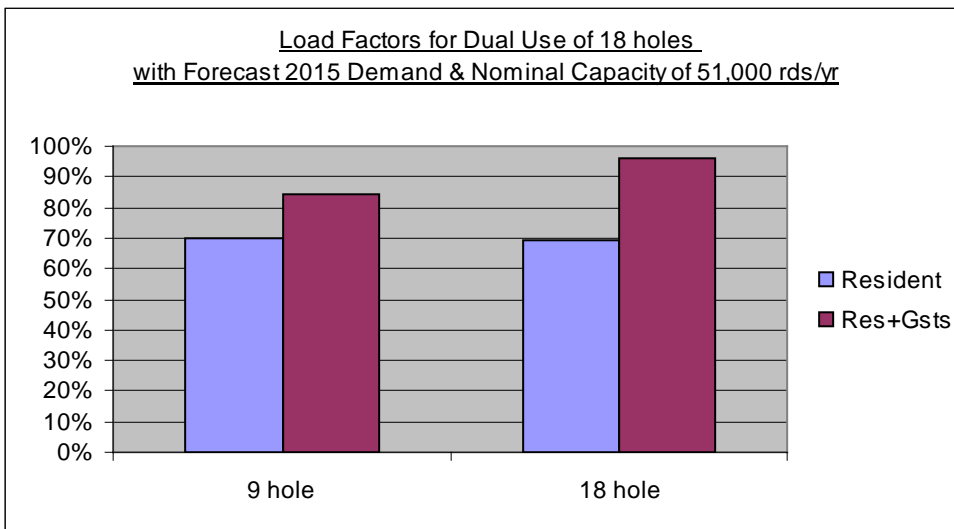
*This data suggests that it seems reasonable to project that Rossmoor's use could be increased to the average actual use of 51,000 r/y, shown for the thirteen local 18-hole golf courses.*

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**RESOURCE REDUCTION** *To achieve the objective of releasing resources for non-golfing purposes, a reduction from 27 to 18 holes may be considered.*

One arrangement would be to select from the current 27 holes, the 18 holes most suited for both 18-hole play and for “parallel” use as two 9-hole courses. (Considering that residents favor 9-hole play, the availability of two 9-hole courses with differing difficulty levels would probably be an advantage). If simultaneous 9-hole and 18-hole play proves impracticable on the selected 18 holes then an alternative would be to schedule 9-hole play for three days a week and 18-hole play for the other three days of the week on the selected 18 holes.

The “3 plus 3” plan would reduce a nominal capacity of 51,000 rounds per year to 25,500 rounds per year for each course. As two 9-hole courses would be used for the three days then the nominal 9-hole capacity would be maintained at 51,000 rounds per year. At the forecast 2015 usage levels some spare capacity would be available for both courses as shown on the following



histogram

Under the parameters outlined above, including the reduction to a total of 18-holes, only 70% of the available capacity is needed to accommodate 2015 forecast resident golfing needs, both for 9-hole play and for 18-hole play.

**CONCLUSIONS** The case presented supports the development and adoption of a revised operation plan which:

1 fully supports the current and forecast needs of both resident and guest golfers

2 makes available valuable resources (that are effectively being currently used for the benefit of non-resident golfers), for reallocation to the advantage of non-golfing residents.

Under the proposed scenario it is proposed that Rossmoor Golfing operations should have the objective of maintaining the following conditions:

- Total number of golf holes and fairways not to exceed 18.
- Use of the golf course shall be primarily for residents and their accompanied guests.

Non-resident play shall only be allowed to the extent it utilizes capacity not required by residents and their accompanied guests.

4/02/10 To: The Long Range Planning Commission. URGENT ACTION NEEDED

The nasty, unsanitary, non-code, and non-accessible restrooms at the seventh tee of the

## **APPENDIX I**

### **IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

Dollar Ranch golf course need to be replaced with something that is built to current code for public restrooms and is accessible to handicapped people per ADA. The current version is bare, unsealed concrete block walls, with bare concrete exposed aggregate floors. These wall and floors are soaked with urine and worse. The path to the men's side is mud in the winter. The sink in the women's side is broken. Both rooms swarm with mosquitoes in the summer. The restrooms at the tennis courts and the eleventh tee and the ones at the Dollar picnic grounds/ bandstand and the seventeenth tee, need to have the floors tiled or epoxy-coated and the walls tiled or covered with sanitary board or epoxy-coated at minimum. The Buckeye restrooms do not conform to ASA accessibility codes.

**EROSION IS CHEAPER TO STOP THAN TO REPAIR** The ongoing erosion problems with the creek at the fifteenth tee and at the culvert under the seventh fairway should be analyzed by a civil engineering firm, a design developed and then executed so that this worsening problem is resolved. The current state is only going to get worse and become more expensive over time and could result in the destruction of the large oak tree at the seventh fairway bridge. A knowledgeable engineering firm needs to be brought in to look at the entire length of the creek throughout Rossmoor and asked to recommend a comprehensive solution to the erosion and flooding problems, bridge overflowing issues, etc.

**COMPLETE THE CREEKSIDE FACILITY** While golfers do have a beautiful twenty seven hole golf course. We do not have a clubhouse. We do not have space to store our equipment or records. We do not have a place to change into our golf shoes or to leave our street shoes or clothes while we play. Swimmers, woodworkers, potterers, jewelers, photographers, table tennis players and lawn bowlers do have this and I feel strongly that they need this amenity. I hope that golfers can find some accommodation in the new Creekside for at least storage of our records and some of our supplies we need weekly. If each of the four clubs had a 3' wide by 8' high plus and 3' deep locker stack we would have some of the storage space we need. If some space for club storage at Creekside could be found it would give relief to a sizable number of our more senior and frail golfers. Right now many of them have carts but cannot leave their golf bags on them and must carry them to their manor after every round along with other gear. It is a strain and sometimes prevents them getting out and enjoying a few holes of golf. A secure, cart accessible bag storage area would be real blessing for these worthy players.

7/15/2010 11:14 am To: Long-Range Planning Task Force Question for town hall meeting  
It is understandable that the committee plans for increased usage of Rossmoor facilities -- specifically the increasing number of residents using the fitness center. Should not the committee also consider facilities showing substantial decline in usage.

According to figures from Mark Heptig, 92,000 rounds of golf were played in 1989; in 2009, 60,000 rounds were played: a decrease of over 33%.

When I moved to Rossmoor in 1990, the golf portion of the coupon was about \$5. Today I pay over \$17. Such increases seem unethical at a time when the oldest, less affluent, most vulnerable of our residents are turning to charity in order to stay in their homes. Neither the administration, GRF board nor the golf advisory committee seem willing to deal with this problem even though national figures show the same statistical decline in recreational golf. Will the LRPTF address this issue and consider a solution (such as closing one of the courses)? Thank you!

4/28/2010 12:07 pm

Attached is a revised power point presentation please use this to overwrite the prior file. The only change is in the no 6 slide the summary. Consequently I have attached a separate file of just slide 6 which you can print and replace slide 6 in any printed copies you may have made. Please make this correction .

The proviso remains the same: "The presentation represents my thoughts and has not been debated by the GAC Committee.

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The attached power point document is the result of analysis of past golf course utilization, player comments, and the understanding that GRF intends to keep the golf courses as essentially private with user financial support in the form of subsidized fees as opposed to totally GRF coupon supported as is the practice with all other amenities. The analysis includes data for the period from 2000 forward with more detail on the period from 2004 thru 2009. As a general observation the performance over this recent period reflects the sub-standard conditions of facility support for the Rossmoor golf experience. This particular problem should be significantly reduced with the completion of the Creekside complex under construction. Consequently until we see some operational information for a year or two in the future it is premature to judge the future of golf in Rossmoor long range.

This analysis is my thoughts. It has been shared with the Committee but it has not been discussed at length or voted on as representing a consensus of the Committee. Committee review will take place at our next meeting the first Friday of May. In the mean time and questions should be addressed to me.

Thank you for taking the time to review this presentation. This document was revised by the GRF Golf Advisory Committee and the final document is in another Appendix.

4/21/2010 11:08 pm

Although Mike Fleck and myself have been corresponding regarding course utilization data there has not been any mention of our working together on better usage of the golf course areas but I would be willing to help if such a need develops.

I trust the Questions Raised section of the Rossmoor Golf - Trends Report will be addressed by the Golf Advisory Committee and/or Mark Heptig and their recommended actions will be reported back to the LRPTF and the consultant DCE for inclusion, if appropriate, in the final Long Term Plan.

I will be pleased to help in any way I can, such as by updating the Trends Report to reflect proposed alternative corrective measures.

Thank you and all the LRPTF team for your good work on behalf of all residents.

4/28/2010 3:37 pm > Mike, Thanks for giving me the opportunity to comment on the GAC LRP Report transmitted with your email dated April 25th, 2010.

A first and overwhelming reaction is that the report is predominantly another historical review. All of the charts are devoted to the past and very little of the text provides the specialist information needed by those who are tasked with developing a plan for Rossmoor's next 15 years. Effectively, the report infers that the planners will chart a forward course based upon what they can see in the rear view mirror.

The suggestion to "wait and see" how much impact the current changes will have upon golf resource utilization is scarcely a plan. A way to provide the planning information needed is to develop projections for three conditions;

- a), a continuation of the current trend, b), a most favorable feasible trend and
- c), a least favorable feasible trend.

These projections would support quantification, primarily in terms of utilization factors but also in terms of the related fiscal and physical impacts, (the "Long Range Planning Needs for Golf" detailed in the report should also be scheduled and taken into account).

Additionally, it would be very constructive to use the projections to estimate; current trend, best trend, and worst trend "snapshots" of the utilization and financial levels forecast for, say, 2015, and to the extent feasible for, say, 2020, and 2025. These "snapshots" would allow the identification of potential critical conditions and appropriate contingency plans.

The report states "guest play is a tool for interesting potential new residents and creating outside revenue to offset resident costs for golf maintenance". As the demand for resident play has been shown to be in decline for the last three years it would now be timely to reassess this premise with GRF and to develop resident and guest play levels at which it is, (or would be), prudent to restrain guest play. These considerations should take into account

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the reality, as supported by the recent survey, that some golf course areas or other assets could potentially be currently utilized to the benefit of a greater number of residents. The considerations outlined above need to be addressed in order to support the effective development of a Long Range Plan that will be in the overall best interests of Rossmoor and its residents. If the parties closest to the subject do not evaluate them, then the consultant (DCE) and the LRPTF will be handicapped when reaching conclusions and as a result, the plan may well not reflect the best interests of those parties.

If you feel I can be of assistance please let me know.

5/13/2010 4:43 pm

I have considered attending Golf Advisory Committee meetings but feel my concerns for the need to better balance the interests of low and fixed income residents with those of the golfing community have been adequately conveyed to the GAC by means of my emails to Mr Fleck and the LRPTF. Nevertheless, should questions arise with which I can help, I will be happy to deal with them by email.

I have been happy to learn that a new Golf Long Range Plan proposal is being prepared by the GAC. To detail the real demand for Rossmoor golfing facilities it will doubtless quantify past, current and forecast resource utilization. In my opinion, this most basic operational information is needed to provide the LRPTF with essential information, particularly, the preferred, maximum and minimum ratios of resident to guest players relative to the resources required for each ratio. If the ratio of guest players to resident players is too large then resources that could otherwise be reallocated to advantage of non-golfing residents will instead be used for the benefit of guest players. There is a level (which may well have already been reached), at which it is not appropriate to increase the number of guest rounds relative to the number of rounds played by residents. This limit should be quantified.

There will be competing calls upon Rossmoor's finite resources as the various interest groups submit proposed plans, the results of the BW Survey and the recommendations from the consultant DCE are taken into account by the LRPTF. The choices will inevitably entail the reallocation of available and/or released resources. Appropriate reductions in resources devoted to the recreational golf facilities will facilitate establishment of cost effective short-term and long-term scenarios, accommodating all residents, within the overall 15 year Plan. To summarize, I will not be attending GAC meetings because my personal views could be diversionary to the crucial objective; that the GAC plan/s satisfy the GRF Board, through the LRPTF, that now and in the next 15 years, the golfing facilities will not be allocated more than the necessary amount of physical and fiscal resources. Accordingly, the GAC plan/s will be designed to promote the best interests of the majority of Rossmoor residents.

Thank you and all concerned for the LRPTF's good work and openness.

#### 7/23/10 4. Golf facilities - Action FIN-2.2

In some manner, a way should be found to expand usage of the golf courses. It may open it up for outside play, but that would mean extra revenue – a big ++.

4/8/2010 10:17:05 pm

On February 7th I sent an email to the LRPTF concerning the February 3rd meeting. The primary purpose of that meeting was to receive a presentation from Mark Heptig specifically addressing Rossmoor's golfing amenities. The email included the following: "It would be most helpful if graphical trends could be presented showing the historical annual change in the number of resident and non-resident rounds played and forecast trend lines for as far ahead as is reasonable. Various forecasts could accommodate different potential scenarios".

As advised in your email dated February 9th, you were kind enough to forward the email to

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Michael Fleck and Mark Heptig. Mike Fleck considerably arranged a meeting and subsequently provided additional historical data that has facilitated preparation of the graphical charts envisioned in the reference above.

These charts are assembled into the Report attached to this email which also includes suggested further developments.

I hope and trust the Report will be of value in developing the Long Range Plan. If you feel I can be of assistance in related further activities please let me know.

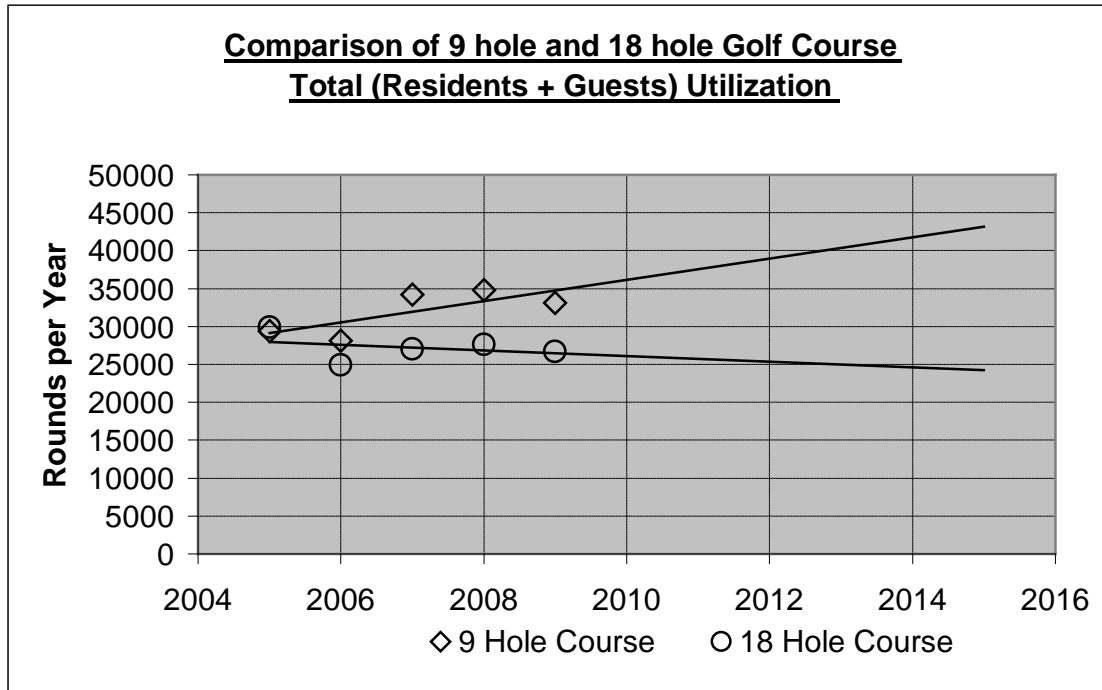
Chart: The Outlook for Golfing in Rossmoor

Objectives and Purpose

- 1 Apply computer generated trend lines to historical golf course data in order to:
  - Identify current and probable future golf course usage factors and trends.
  - Suggest potentially advantageous alternatives to current practice/s
- 2 Submit report to the Long Range Planning Task Force and the Golf Advisory Committee.

### Five-year utilization comparison of 9-hole and 18-hole courses

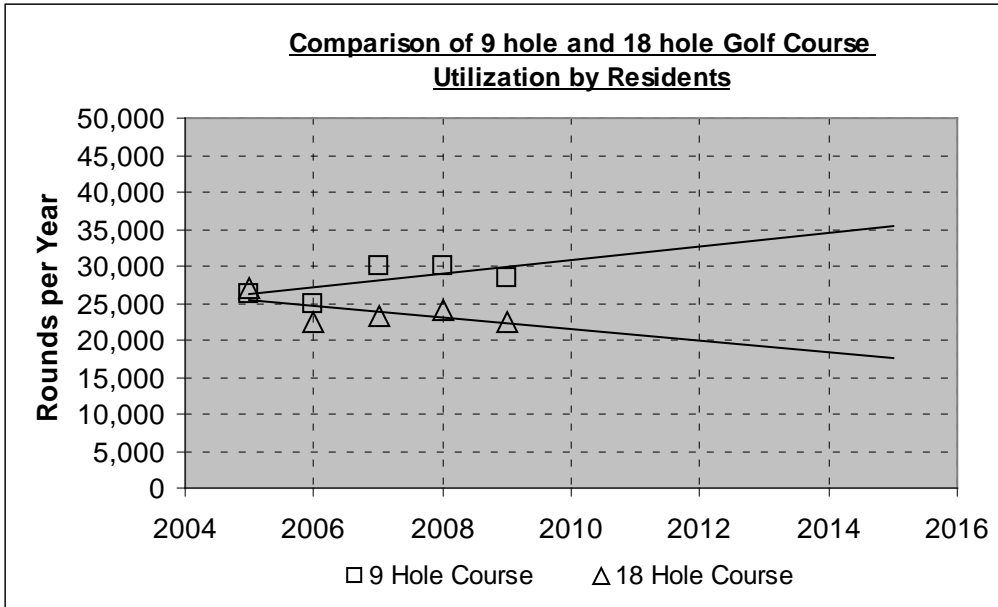
Records enabling comparison of the popularity of each course (excluding approximately 330 tournament rounds per year) are available only for the past five years; this data is represented on the two following graphs.



In 2005, both golf courses were more or less equally popular but the subsequent divergence (shown above) indicates a significant increase in appeal of the 9-hole golf course.

As shown below, the 18-hole course is becoming significantly less attractive to residents.

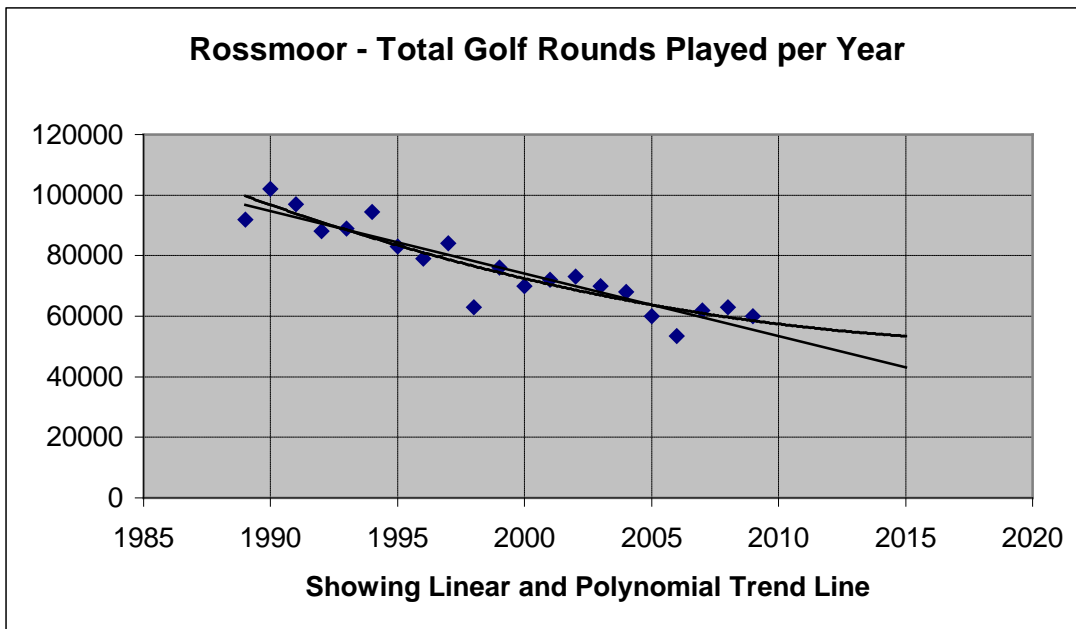
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Total number of Rounds played annually, on both courses, by residents and guests

The trend lines extensions shown on the two graphs below enclose the future range that can be reasonably expected based upon continued use of the established operation plan

The total number of rounds played annually, by residents and guests has been declining for the last 20 years at an average rate of more than 200 rounds (2.5%) per year as shown below:



4/12/2010 1:03 pm Aloha LRPTF members,

Our Rossmoor Men's Golf Club Board met today and spent a good deal of time discussing an urgent concern of ours. The restrooms at the Dollar Ranch golf course need to be improved. They need a quick fix now, and they need to be reviewed as to whether or not they should

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be replaced. We heard testimony today regarding visitors who, as golfers, said they would not buy in Rossmoor simply because these restrooms were in such bad shape. I should point out that the restroom by the green at hole #10 serves the Tennis Club as well as golfers. And the restroom at the 16th green serves a great many people in the picnic area of the Dollar Clubhouse.

4/10/2010 7:30 pm

The letter below, and the attached list of petitioners, express our feelings and suggestions, we sincerely hope it helps your committee in providing input to the GRF Board.

It is our understanding you have been charged with the responsibility to provide input to the GRF Board related to GRF owned and managed facilities within our community.

The nasty, unsanitary, non-code, and non-accessible restrooms at the seventh tee of the Dollar Ranch golf course need to be replaced with something that is built to current code for public restrooms and is accessible to handicapped people per ADA. The current restrooms have bare unsealed concrete block walls, with bare concrete exposed aggregate floors.

These walls and floors are soaked with urine and worse. The path to the men's side is mud in the winter. The sink in the women's side is broken. Both rooms swarm with mosquitoes in the summer. The restrooms at the Buckeye tennis courts and the eleventh tee, and the ones at the dollar picnic grounds/ bandstand and the seventeenth tee, need to have the floors tiled or epoxy coated and the walls tiled or covered with sanitary board or epoxy coated at minimum. They should be verified to be in compliance with accessibility codes first.

The ongoing erosion problems with the creek at the fifteenth tee and at the culvert under the seventh fairway should be analyzed by a civil engineering firm, a design developed and then executed so that this worsening problem is resolved. The current state of problem erosion is only going to get worse and become more expensive over time and could result in the destruction of the large Oak tree at the seventh fairway bridge. A knowledgeable engineering firm needs to be brought in to look at the entire length of the creek through out Rossmoor and asked to recommend a comprehensive solution to the erosion and flooding problems, bridge overflowing issues etc. There are property values and life styles to protect.

Rossmoor now and in the future continues to compete with other active retirement communities. Location and our golf course and facilities are our big advantage (even though we are in one of the most expensive areas of the country), but allowing our amenities to stagnate or deteriorate will not be overcome by our location. We believe it is very intelligent to have long range planning. We urge each member of the committee to please remain focused, keep your eyes on the ball and don't let the few divert you from the intended goal: to continue Rossmoor as a very desirable place to call home, now and in the future.

18 Apr 2010 Subject: Event Center and the golf community

Long Range Planning Task Force, thank you again for your voluntary service in our behalf. I am writing to you today in order to clear up a misconception.

I have twice run across a statement that 'the golf community is very desirous of getting the Event Center built as without it we cannot attract outside tournaments due to our lack of banquet facilities.' This is not true. The facts are that we have no problem whatsoever with the existing "banquet facilities" for lunches, breakfasts, parties, meeting rooms and so on. Whether for outside tournaments, events open to all Rossmoorans and their guests or our club events. We look forward to the completion of the Creekside facility under construction currently as it will be even better for most of our post tournament needs. In fact, the Event Center is no issue at all for the golfing community if, when it is built we can have the practice facility on which it will sit moved to north of the Creekside tennis courts.

If built the event center may be the venue for the annual golf holiday party and nothing

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more. The annual holiday party has nothing to do with outside tournaments. The fact here is that the event center if built, will supplant the Sierra Room at Del Valle where our Holiday Dinner Dance has been held. We would welcome this change as the acoustics and general design would be superior to those of the old gymnasium.

The Event Center will be for performing arts and larger community events. I feel that a large number of residents are interested in the performing arts, speakers, and large dinner dance galas. That number does include golfers.

12 Sep 2010 10:55:53 -0700

Rossmoor golfers as represented by the Golf Advisory Committee could be included.

This listing is generally in the order of highest priority or most currently needed.

It is the opinion of the Committee members that golf is the most attractive amenity for potential new owners offered at Rossmoor and that as such the course and its facilities should be maintained in a most attractive and serviceable manner. The investments made in improving the golf amenity will lead to more golfers electing to own in Rossmoor and increase course utilization with the end result of higher home prices and lower coupon burden to support golf for all owners in the future.

We believe the effects of the new facilities at Creekside will be a significant part of this improved attractiveness of Rossmoor. To this end we believe that some efforts for significant change to course availability to guests are premature, and may have the effect of reducing the benefit of ownership and consequently the long term value of Rossmoor properties.

Thank you for your patience. On behalf of the Golf Advisory Committee.

### **TRANSPORTATION**

7/16/2010 5:54 pm Transportation,

I strongly support a comprehensive transportation system. I believe there is a need to move people out of Rossmoor to local events, and to public transportation. I have never used this amenity so cannot directly comment.

April 19, 2010 Re: Transportation needs for the future of Rossmoor

I cannot attend the meeting of the Long-Range Planning Committee on April 21, 2010 due to other commitments, so I am sending this letter, which I hope you will consider in your discussions of the future transportation needs of the Rossmoor community. I have lived in Rossmoor for almost 3 years and I ride the buses. I do own a car and I do drive. But I prefer to avoid driving for short, routine local trips—for both environmental and economic reasons. If Rossmoor residents can stay out of their cars for many short, local trips within and around the Valley, we will have cleaner air, fewer accidents, less stress on our roads, and a safer, healthier, and more efficient environment for our present and future residents.

However, the current shuttle bus service does *not* facilitate this. Rossmoor (except for the Waterford) is an active adult community. For those with mobility problems we have the para transit service, and this must remain. But the regular bus service does not meet the needs of the rest of the community for convenient, reliable, and timely local transportation.

Take the case of the Blue Line, which serves Ptarmigan Drive, where I live. The morning dial-a-bus service ends at 8:30 am. The first scheduled bus arrives at 9:26 am. Note that this bus arrives at the Rossmoor Shopping Center at 9:39 am, 6 minutes *after* the 9:33 am County Connection bus leaves for the BART station and the John Muir Hospital. The next CC bus leaves at 10:33 am, almost an hour later. The only way to catch the 9:33 am CC bus using the Rossmoor service is to arrive at the Shopping Center at 8:45 am, more than  $\frac{3}{4}$  hour in advance.

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The last, regularly scheduled Rossmoor bus arrives at Ptarmigan Drive at 4:35 pm. The evening dial-a-bus service does not start accepting phone reservations until 5:30 pm for trips usually starting about an hour after that. This means that there is NO bus service from 8:30 am to 9:26 am and from 4:35 pm to about 6:30 pm—prime times for travel. *In fact, of the 10 regularly-scheduled weekday trips from Ptarmigan Drive to the Shopping Center, 7 of them require Rossmoor riders to wait from 25 minutes to an hour for the next County Connection bus. An eighth arrives 3 minutes before the CC bus leaves (a close shave), and a ninth requires an 18 minute wait. Only one of these buses leaves a reasonable 10 minute wait.*

It is now over a year since the new County Connection bus schedule went into effect, but the Rossmoor buses are still on the same old schedule put in place in 2004. Our time becomes more valuable as we age, since we have less of it left. But we, the Rossmoor residents, are treated as though we have all the time in the world.

I could relate many anecdotes about late buses and flippant attitudes on the part of drivers, but there seems to be a practice of discounting them as “just one person’s opinion.” So I won’t bother. We, the Rossmoor residents are paying for this service, and we, the Rossmoor residents, deserve better.

A new schedule, on the occasion of our beautiful new buses, is now due. It can perhaps be hourly, to coordinate with the new County Connection schedule, instead of every 45 minutes. The savings should be used for more direct service to BART and downtown Walnut Creek ALL DAY EVERY DAY.

There also seems to be a practice of defending against requests for better service with threats of increases in “the coupon.” That day is over. And do not insult Rossmoor residents with arguments that we do not like change, or that the reductions in the County Connection service may not be permanent. With careful study and planning, we can provide better service, improve the environment, attract new active residents, and do it all with no new budgetary costs, except those occasioned by normal inflation. It is time to bring the Rossmoor bus service into the 21<sup>st</sup> century.

August 03, 2010 3:10 PM Bicycle-Friendly Community Dear Task Force members,  
I am interested in improving the conditions for bicycling in Rossmoor. To that end I hope that you will give some consideration to this matter in your deliberations. Maybe you've already considered this topic. If so, all the better. If not, please include the matter in your General Plan. I believe that, with very little effort and expense, bicycling safety can improved. I think that a few signs, some pavement markings (probably there is not enough space for actual bike lanes), and an education program in the Rossmoor News would pay big dividends in terms of safety and convenience.

These ideas, I believe, are entirely consistent with the "vision" for the General Plan as recently reported in the Rossmoor News. I am attaching earlier correspondence with David Smith for additional details of my thoughts. All this detail probably should not go in a General Plan but I hope that it can somehow be passed along, nevertheless.

Thanks very much for your fine service to our community.

May 26, 2010 Subject: Bicycling in Rossmoor

I have lived in Rossmoor for about 19 years and, during that time, I have endeavored to go on a bike ride every day. I do this primarily to try to control my weight, keep fit, and to run errands. I have never belonged to any local club so there may be a Rossmoor bicycling organization that I am not aware of. In any event, I have noticed an increase of cycling activity in Rossmoor in recent years. I think that it would a good thing if the Golden Rain Board would give some

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attention to the safety and convenience of cyclists. Certainly it has given attention other safety issues (fire, auto, pedestrian). If you agree with this thinking, perhaps you could make a motion at a meeting to take some action. When I think about this, a "proclamation:" comes to my mind, thus: Proclamation: WHEREAS bicycling is enjoying a resurgence in part because of its health and environmental benefits and WHEREAS the DOT, many states, and many communities including the city of Walnut Creek are improving infrastructure and adopting laws to establish Bicycle Friendly Communities and WHEREAS a Bicycle Friendly Community would have added appeal to (younger) prospective Rossmoor residents THEREFORE BE IT RESOLVED that the Foundation will endeavor to improve the bicycling conditions within Rossmoor by directing staff to spend [say 1 or 2 or more] hours per week to research, plan, and implement no-cost or low-cost improvements for the benefit of bicyclists. [Two low-cost examples: "sharrow" pavement markings (as seen in Lafayette) and a low-key education program in the Rossmoor News] [End of "proclamation"]

Of course your motion would be worded differently. The Bicycle Friendly Community (BFC) referred to above is a designation given by the League of American Bicyclists who are, of course, campaigning for improved infrastructure and laws. Information about the BFC program can be found at [www.bicyclefriendlyamerica.org](http://www.bicyclefriendlyamerica.org) which, incidently, would be a good place to start any research. It is my understanding that Walnut Creek is attempting to become a BFC. Thank you for your kind attention.

7/23/10 Transportation - TRA-XX

I have long felt there should be another exit (or more) from Rossmoor. It could be open in event of an Emergency/Evacuation- selective or mass (TBT).

The emergency plan should identify helicopter landing areas for Med. Evac (if it isn't already done).

### **SECURITY**

**7/23/10** Encourage implementation of SEC-2.2.

7/20/2010 1:58 pm

First, I would like to express my appreciation to all of the members of the LRPTF for the time and effort you have devoted to this important task. The product of your work which was presented at the town meeting on Saturday was impressive - both in its scope and depth.

I have been an active member of the Emergency Preparedness Organization and my feedback deals with Securities, G3oal SEC-2 An ability to respond to emergencies and disasters and Communication.

In regard to Actions Policy SEC-2.3, I believe there is an error. We have been instructed in EPO that in a disaster residents are to "shelter in place" until instructed to do otherwise and that the "evacuation routes" referred to in this policy are solely for the use of emergency vehicles to enter Rossmoor. In case an order to evacuate is given, we have been told the procedure would likely be to to have all lanes at the entry gate one-way, going out. I believe Dennis Bell will confirm this information.

In Action SEC-2.1 reference is made to development of an implementation program for the Emergency Response and Preparedness Plan. Such a program has been in the works for several years, but has yet to be completed. My first knowledge of the project was when

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Shannon Walpole was tasked with it and was very busy with other assignments. I know she was relieved of this assignment, but have not heard who has taken it over and what its status is.

There is no mention in the Securities draft of an Action item such as Action WLN-1.1 "Create an ongoing program to publicize information concerning wellness services..." Many of us in EPO believe that there should be a dedicated section in the Rossmoor News where all of the relevant articles concerning preparedness would be grouped together instead of randomly throughout the paper. Articles about Red Cross classes, C.E.R.T. training and drills, EPO meetings and work shops, calls for Emergency Entry volunteers and CB operators and regular reminders of basic supplies and equipment for disasters which residents should have ready would be included. There should also be a listing of Emergency Preparedness on the front page in the table of contents (Inside the News) .

This suggestion would be consistent with the policy stated in Communication COM-1.2 "Communicate with residents in a timely manner to ensure that important information about governance, safety, emergency preparedness, services and programs is readily available. Thank you for your consideration of my feedback. I hope it has been useful.

7/22/10 Cameras at the entry gate to record license numbers

Received On An Unknown Date:

Institute a **"Revised Master Key Program"** in which Residents, at their option, can register with the Rossmoor Security, the name, phone number, and address, of a neighbor (s) to whom they have entrusted a key to their home, so that should security need to access, they can do so without having to damage a door or window to gain entry. The key (s) would be with the Trusted neighbor (s) and not with Security.

Date: Fri, 20 Nov 2009 14:53:38 -0800  
Subject: Planning for a Future Rossmoor

Here are a few electronic enhancement ideas for your consideration.

If more are needed, please let me know.

1. Security cameras should be at entrance, club houses, with a recorder
2. Rossmoor ID card with photo, basic information, contacts with RFID for admission to pools, other services (and utilization data)
3. Resident data base (for emergencies), with off-line storage
4. Emergency info system, with speakers in all clubhouses, buildings
5. Central emergency message system alerting all wired, cell phones
6. Electronic door "keys" for residents, Security

### **WELLNESS**

20 Nov 2009 14:53:38 -0800 Planning for a Future Rossmoor  
24-hour (medical/nurse) information and help line

August 15, 2009 Keep Counseling services

3/6/2010 10:52 am

> For those interested, a just released survey on Middle-Boomers, (by metlife,

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> 3/2010).

<http://www.metlife.com/assets/cao/mmi/publications/studies/2010/mmi-boomers-midd\ > le.pdf>

Will be interesting to see IF there is any reflection in the GRF Survey and the metlife results.

#### **SOCIAL AND RECREATIONAL PROGRAMS AND LOCAL AMENITIES**

3/28/2010 5:48 PM Members of the Task Force,

The main reason the Golden Rain Foundation Trust exists is Rossmoor amenities: choosing, funding, building, major rehab. It seems to methat a Long Range Planning Task Force funded by, and reporting to, the GRF Board of Directors should focus most of their time and energy in the area of amenities. Yes, there are other areas mentioned: transportation, security, governance, etc., but these should be secondary and not deter from the main objective.

There are those in Rossmoor, some very vocal and insistent, that would like the GRF Foundation to be philanthropic, to enhance the well-being of poor and/or less fortunate Rossmoor residents through charitable aid. Some would even advocate that trust monies be diverted from Rossmoor amenities, current and future, and be used to lower their coupon. I strongly disavow this thinking and urge the task force to do likewise. In fact, I will take it a step further. I believe it is the fiduciary responsibility of a GRF Director to steward and protect Trust monies, and use them only for the intended purpose. GRF boards along with staff, current and future, must concentrate on amenities.

Obvious examples:

increasing the size of the Fitness Center,  
building a multi-use Event Center,  
rehab of Hillside buildings,  
rehab of Dollar clubhouse to make it accessible with better meeting rooms while preserving the center of the current building's architecture.

Rossmoor now and in the future continues to compete with other active retirement communities. Location is our number one advantage (even though we are in one of the most expensive areas of the country), but allowing our amenities to stagnate or deteriorate will not make-up for location. There are property values and life style to protect.

I believe it is very intelligent to have long range planning. Please keep your eyes on the ball and don't let the few divert you from the intended goal: to continue Rossmoor as a very desirable place to call home, now and in the future.

## **APPENDIX I**

### **IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

7/13/2010 3:32 pm

I am not a member of the Garden Club. However, my friends and neighbors are. In addition to sharing produce with neighbors, the club also donates to Las Trampas, a center for developmentally disabled people. They deliver fresh veggies to shut-ins in Rossmoor and recently helped develop a garden bed for a mobility challenged resident as part of an Eagle Scout project.

Unlike other Rossmoor amenities such as the pools, fitness center, golf, wood shop, etc., they get no funds whatsoever from GRF. They pay their own electric, maintain our own wells for water, even rent their own porta pottie.

The garden needs maintenance and improvements that are beyond the financial reach of the members. They have quadrupled the dues and increased the initiation fee to try and cover costs. They recently paid for and installed a \$1200 new water pump. The garden infrastructure (wells, pumps, piping, fences, road and parking area) is more than 20 years old. They submitted proposals to GRF requesting assistance with:

Establishing a back-up water connection to GRF water in case of emergency and to enable us to comfortably expand the number of lots. Building bins to contain the wood chip and manure supplies that we have delivered to the garden.

Tree Trimming - the GRF trees on our south border are overgrown and have forced us to close lots due to the deep shade. We need these thinned and trimmed. Building a patio area where we can hold seminars and be able to step out of the sun.

I would approve of the GRF and the LRPTF to recognize the importance of gardening as an amenity in Rossmoor and to fund/maintain it as such both now and in the future.

Thank you,

No Date: Dear Committee,

As a member of some interesting clubs here in Rossmoor, two stand out.

The golf clubs are some of the best, such as the Niners and Happy Hackers.

The other is the Garden club. It is a wonderful experience to "dig the dirt".

The rewards are, not only, fresh vegetables but the fitness and friendship

and the beauty of early mornings or late evenings to water and weed and pick.

Now there's a word -- water. We have a serious problem with our old well and

pipe system. We need support from you. Please consider us in your Task Force plans.

June 2010

Two members of the Rossmoor Community Garden Club Board and I would like to meet with you to follow up on our March 2009 Garden Club discussion. At that meeting we decided to meet again to discuss the Club's immediate and long range plans and areas where we need GRF assistance. This report has been reviewed by board members and discussed at our recent board meeting. We intend that it serve as a discussion guide for our meeting with you.

**GARDEN CLUB STATUS** The Rossmoor Community Garden Club has approximately 150 members, spouses, partners, Rossmoor friends and family working 80 garden lots, 17 fruit orchards and

9 berry patches. Lots that become available are immediately assigned to the next Rossmoor resident on our waiting list. The members have to actively garden their lots; lots not cleaned up and planted by May 15 each year may be retrieved by the Club and assigned to the next applicant. Since November 11 we have accepted 16 new members. The Boomers have arrived. Two members of the Boomer board are club members.

Our garden Club is active within Rossmoor and the local community. Members share garden produce with neighbors, some deliver fresh vegetables to Rossmoor shut-ins and local agencies providing food assistance to the needy. We have set aside space for the mobility challenged. A local eagle scout candidate built a special raised garden bed for this purpose.

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During the past three years the Club has retired 14 garden lots and 6 orchards due to shade from tree growth along our south border. Recently we observed that six other garden lots and two orchards may have to be retired in the future unless there is extensive pruning. The retired lots have reduced our funding base and resulted partially in the increase in dues and initiation fees. Recently we added three full garden lots and three half lots in a shade free area. These were assigned to gardeners on our waiting list.

**FUNDING THE GARDEN CLUB** The Club collects an annual dues of \$55 for each garden lot and a transfer fee of \$300 from new members. Many potential gardeners turn away because of perceived high dues and fees compared to other Rossmoor Clubs. The introduction of a half garden lot membership with a reduced annual dues and initiation fee is intended to make some memberships more

affordable. The annual dues cover Operating Expenses; the initiation fees are placed in Unallocated Reserves. Until two years ago the transfer fees were used for operating expenses and there were no Reserves. Dues have been more than doubled over the past two years and transfer fees have been increased. Our annual Spring Picnic and Summer Tomato Festival have been self catered by members with the proceeds added to Reserves. The Club also conducted a raffle last year. Reserves are maintained for water and irrigation system replacements, emergencies and Club improvements. Reserve expenditures must be approved by the Club's Board.

**OPERATING EXPENSES** This year the Club has an operating expense budget of \$5,400 to pay for Garden Services, Well Maintenance, Utilities, Portable Toilet Rental, Postage and Supplies, Irrigation System Maintenance, Refurbishing Garden Lots, and Plumbing Repairs. Expenses were reduced last year as a result of our use of e-mail for most member communications, and renegotiating a lower Toilet Rental.

**RESERVES** Last year expenditures totaled \$2,400 for a new pump, irrigation system valve replacements, and the regrading to a natural state retired garden and orchard lots.

**PLANS AND GRF ASSISTANCE** The garden club has not received any funding from GRF since moving to its present location in 1988. Evidently this was not an issue with the original membership but it is with our present members. They do compare the funding of other Rossmoor activities with the absence of funds for the garden club. A recent new member transferred from Laguna Leisure World reported 800 gardens there with all operating cost and improvements paid by

their GRF. Members pay a dues but it is for social activities. We want to see a reversal of this situation and have the Garden Club recognized as an integral part of Rossmoor and funded at a level consistent with other member clubs and activities. We have listed below those areas in our priority order where the club seeks funding.

**WATER SUPPLY** The Club relies on two wells for its irrigation water. One has been in use for 22 years; the second for 18 years, Well maintenance, pump repair and replacement, storage tank and water distribution system maintenance and electric utilities cost approximately \$2500 a year. Water production has been adequate except in late summer when garden demand is high. We continually urge conservation and implement watering restrictions when

necessary. Well failure is a possibility. There is no garden without water.

The buried water distribution system mains seem to be adequate. The pipes off the main and control valves are of mixed quality, some pipe is schedule 40 pvc and some schedule 20. The latter pipe is not designed for continued pressure and is a source for leaks.

Replacement will be difficult since we have limited information on its location.

Deficiencies with our water system defers garden expansion. If we were comfortable with our water supply the garden could be expanded into our open field and into areas recently retired. We ask GRF for funding to:

Install a backup emergency water supply. Remove and replace all schedule 20 pvc.

**TREE GROWTH AND GARDEN SHADE** Since the Club moved to its present location 22 years ago, there has been a considerable and uncontrolled increase in tree growth and shading

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along the garden's south boarder. We have retired 14 garden lots and 6 orchards during the past three years due to shade. Six other garden lots receive less than optimal sunlight for a garden and may have to

eventually be retired. Rich Peronna prepared a plan to correct the shading but GRF declined to implement it. The Club does not have the resources to maintain bordering trees. We ask GRF for funding to correct and maintain tree growth and shading.

**FIRE PROTECTION** Our open fields require annual roto tilling and the growth along our road and paths are weed whacked for fire protection. The garden club has performed these tasks every year since 1988; GRF did roto tilling in 2009 and 2010. We ask that GRF continue with the roto tilling and provide weed whacking service to the club.

**DRIVEWAY AND PARKING LOT** Our driveway dust is a nuisance for neighbors and our gardeners. We post a four mile per hour speed limit and installed a speed bump but this is not enough to prevent dust.

The garden entrance gate has to be manually opened and shut. The gate has to be kept closed for security and to keep deer out of the garden. Each garden visit requires getting in and out of a car four times. This is a nuisance for all members and very difficult for some of our physically challenged members. Unauthorized entry into the garden is a big problem. Theft of tools and garden equipment is common. Fruit and vegetables are also stolen when ripe. The gate is kept unlocked during the day but secured with a chain and combination lock when the garden is vacant and at night.

The garden's manure pile is stored in our parking area. Most members find the sight and odor offensive. Recently a large revolving compost drum was installed in the parking lot for lack of another suitable location.

We ask GRF for funding to:

Pave the driveway and parking area.

Install an electronic gate.

Continue with security guard early morning and evening visits.

Install two large bins along the driveway for manure and wood chip storage. Our wheel barrows and composter would be placed in this area.

**MEETING SPACE** We need a shaded area in the garden where gardeners can sit and rest, have lunch and have discussion meetings. We have identified an area along the upper path leading from the parking area to the orchard and partially shaded by our large oak.

We ask GRF for funding to:

Develop the designated area to a size sufficient for our purpose.

Install adequate picnic tables and other seating.

**GREEN HOUSE** The garden club needs a greenhouse so that our annual plantings can be started early. Most of our annual flowers and vegetables are purchased at some significant cost or started by gardeners at home. A greenhouse would add considerably to the clubs amenities and our members gardening experience.

We ask GRF for funding to install a greenhouse, and related access road and utilities.

Jul 16, 2010 1:29 pm Long Range Planning Task Force Meeting on July 17 Greetings, I am writing this email because I cannot attend the Long Range Planning Task Force Meeting on July 17. I am writing to support the Rossmoor Garden Club. I have been a member of the Garden Club for three years. My husband and I moved to Rossmoor in 2006. One of the primary benefits that Rossmoor offered us was a chance to move to a smaller home after our retirement and still be able to continue our love of gardening. The Garden Club offered us an opportunity to make new friends at Rossmoor, be outdoors and grow vegetables that supply both our household as well as two of my neighbors. Gardening serves as a form of meditation and has enabled me to maintain my mental and physical well being.

I urge the Task Force to include in its recommendations to the Golden Rain Foundation Board that GRF assist the Garden Club in securing a constant water supply. During that last

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two "dry" years, water was in short supply during late summer and fall. The Club diligently adopted water rules to ensure that we do our part to wisely use this precious resource. However, there continues to be a need to supplement the existing well water. I also request that you work with the Garden Club Board members to identify specific actions that the Task Force can include in the final recommendations to support this Rossmoor asset. The community garden is a good marketing tool for new residents and similarly attracts new residents like the fitness center, golf course, tennis and swimming pools. Thank you

7/16/2010 5:54 pm

Here I also have grave concerns. I have lived here for 7 years and have seen one amenity after another reduced or eliminated. For the most part I have not been impacted, however they were services that I had expected

to be available to me should I choose to use them. Amenities are not added, we are just receiving less for our coupon as the years go by. I assume this will continue due to the defined benefit issue described above.

### **COMMUNICATION**

February 17, 2010 Answers to late survey essay questions by female, born 1919 Very dissatisfied with communication: Get real- listen when the majority say no.

February 16, 2010 Very dissatisfied with GRF communication: Maintenance – maintain existing structures, dry rot railings, decrepit path lighting, leaky roofs, condo yards & plantings. Only structures & gardens seen by guests are cared for.

20 Nov 2009 14:53:38 -0800 Planning for a Future Rossmoor

Here are a few electronic enhancement ideas for your consideration.

If more are needed, please let me know. "Welcome to Rossmoor" in the Gateway Clubhouse entrance, with a small TV screen offering a video, directions, info, etc.

August ,2009

- 1) Modernize access to Rossmoor info via up to date search tools
- 2) Keep info on Rossmoor websites up to date
- 3) create a GRF Marketing and Communication Advisory Committee ( note there was one that disbanded itself after about 5 years).
- 4) Put GRF committee info online

February 23, 2010

Nancy and Long Range Planning Task Force members:

my husband, and I spent a few hours, when he returned from the Focus Group he attended, examining the issues the group was charged with discussing.

It seems to me that the Task Force should keep its emphasis on studying what is going to change in the future without trying to tackle shorter-term topics (like committee structure). These are valid issues, but they will impact your ability to anticipate broader trends which will affect Rossmoor in the future. I would like it

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to be taking hard looks at energy, technology, communication and transportation issues into the next decade. For example, in our 9 year old condo, the builder added a niche for a TV in the family room. It is 24" deep. The HD TVs sold today are about 2" thick. That is not long-range planning by the builder.

Does the task force have plans to be more forward-thinking for the future of Rossmoor? I have been thinking, for example, about the Event Center at Creekside which might be constructed in the near future. Will it be built with consideration for futuristic technological and energy-efficient components? Will Rossmoor create a battery-charging station for electric cars soon to be at the marketplace? Will Peacock Hall be prepared to project movies using downloadable selections directly from the internet (not the hard DVD version used today)? Should Rossmoor have fiber-optic cable laid throughout the valley in preparation for future needs?

There are many more examples which I am not knowledgeable enough to suggest, but I do feel it is incumbent upon us to look to the futurists in each of the disciplines of energy, technology, communication and transportation for these answers. In this way, Rossmoor will be primed to enter the next decade prepared to compete as an Modern Community of Active Adults and not an Aging Community of Aging Adults.

2010 20:17:37 +0000 Future Planning/Rossmoor

In a conversation yesterday with Warren Salmons I made a suggestion that he thought was worthwhile! I will precede it by saying that there is a need in Rossmoor for a means of communication to at least 80% of the residents. I have heard too often comments like, "I never read that" when referring to the Rossmoor News, and Channel 28 doesn't capture my interest.

Although I realize that this would be a 5-year commitment!---my suggestion was to erect an electronic message board near the entrance to Rossmoor. At least 80% of the residents do go in and out. This would be similar to what is located at most high schools. This would also be useful in the time of an emergency!

This thought came to me when I was thinking about how to reach people in regards to the Scholarship Foundation. As I said Maureen is more than cooperative, but then our flyer is put inside the advertisements which is inside the paper!!! I know another problem would be scheduling the announcements. The Scholarship Foundation might be able to make a small donation for its erection!!! One of my Foundation members is going to inquire at a high school about what was involved with erecting their board.

> I will be interested to hear what reaction my suggestion gathers?!

3/27/2010 5:02 PM

I agree, vision is important. So are sales skills...the last leadership course I took said the first step in leadership is to "build a shared vision of the future." The best vision in the world will go nowhere without being sold. Courage helps but can't be a substitute for sales.

I can't comment on Peacock or Gateway....I wasn't here. Similar things will be said about Creekside of course. I think part of the problem with Creekside was that it wasn't being sold very well initially. I could elaborate over a cup of coffee.. Best regards

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Wed, 24 Mar 2010 10:57:26 -0600

I could well be preaching to the choir here...saying things you already realize..but I'm 2000 miles away and all I know is what I see on the Internet. So at risk of stating the obvious: The survey of current residents is getting a lot of attention. It is a very important piece of information.

However, it's not the only important piece of information for a 20 year plan. Most of the current residents won't be here in 20 years. I think it's equally (or even more) important to determine who future residents are likely to be and what they will be looking for. That involves definition of markets and marketing plans to meet their needs. That's a much harder task than surveying a well defined group.

It's especially difficult in a community with a wide range of housing prices. I think it's a safe bet that the group who will move into the G-11 coops is a different group than those who will move into Eagle Ridge. Perhaps marketing should be decentralized to become the responsibility of the individual Mutuals or groups of mutuals.

I bring this up because I have had people I respect tell me that the only important group to please is the current residents. They have implied that it's up to future residents to reshape Rossmoor to their needs. (Generally they are reacting to a concern that change means higher monthly charges.) I don't think that's the route to success. Very few people will move into a community expecting to reshape it. They will have a justifiable concern about a "if you don't like it as it is, move" reaction and just not move to Rossmoor.

The current laissez-faire attitude toward marketing hasn't worked well for the low-cost properties. For evidence, here's a link to an article in the SF Chronicle way back during the property boom of 2005. It called coop prices "bizarrely low."

Because GRF is a mutual benefit corporation, those who think that the only goal for GRF is to meet the needs of the current members have a plausible case. It's difficult but essential that the current residents be led to understand whatever changes are proposed will benefit them. In other words, it will be up to the GRF Board to sell the ideas your task force comes up with. In the case of the lower cost units, one sales point could be that the changes will increase resale prices.

hanks for 'listening.' Best regards and thanks for your continuing service to the community.

5/31/2010 11:43 PM

Regarding Minutes of Meetings; the website

<http://rossmoor.com/documents/grg-committees> lists nine GRF committees/task forces with sub-pages for the posting of Minutes of Meeting, - of these;

none of the nine have minutes dated later than March 23rd 2010, six have minutes issued in March, 2010, one has minutes issued in February, 2010, one has minutes issued in June, 2009 and the other one does not contain any minutes at all.

It is noteworthy that Minutes of April Meetings for Audit, Aquatics, Fitness, Golf, and Policy (and probably Finance) were available for the GRF Board Meeting on April 29th - here we are over one month later and these minutes are still not posted on the website!

It can reasonably be postulated that the Minutes posted are mostly of value for archival research rather than of value for current "news" or motivational purposes.

Residents would have to request to be included on the email lists of their choice so there is very little risk of unwanted email inbox cluttering.

Please note my suggestion regarding email lists referred not only to Minutes but also to Agendas. In contrast to the Minutes, Agendas are not accommodated on the Rossmoor website.

A primary objective of the proposal was to provide a system which would promptly provide residents with Agendas for upcoming meetings and help motivate those interested to become involved - thus timeliness of information availability was the largest concern.

Interested residents (in subjects of their choice), would request to be included on the email

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lists and they would receive Agendas just as soon as they became available and in time for them to be prepared to participate at the meeting.

To conclude, the subject of the meeting to which this suggestion was made was Governance and Communication - which is exactly the objective of proposing the email list system.

Thanks you for good work

7/19/2010 3:30 pm

At the LRPTF meeting Saturday I asked a question which was not really answered. My question was in regard to the use of the term "feasible." See Policy ENV-5.1, Policy FAC-1.3, for examples. The answer given by Mr. Early centered on the balance required between revenue and expense.

I am quite capable of knowing the importance of that relationship. What I asked for is an understanding of how residents can learn the mechanics involved in determining what is "whenever feasible" or ""to the extent feasible" I used the term loophole advisedly because I see no option provided for learning who makes said determination and the grounds on which it becomes action. The matter of transparency is my concern here. Am I merely expected to accept the statement because it is in The Plan?

Thank you.

5/19/2010 10:42 pm Governance and Communication

As an afterthought to today's meeting; building on the discussion about increasing the use of modern technology and the delay in distribution of meeting minutes; a logical progression would be to establish email lists that residents could join if they wished to receive agendas and minutes for meetings in subjects (for example; Finance, LRPTF, Fitness), which interested them.

In addition to the primary goal of improving communication regarding governance issues this approach would also serve to encourage greater resident participation in meetings and as a result serve another goal mentioned at the meeting - the exposure of interested residents to leadership activities and potentially development of their interest in filling future position openings.

The saving in copying costs should defray the costs of maintaining the email distribution lists (for which many software programs are available) and as the documents will not have to be specially prepared the distribution cost will be virtually zero. I would appreciate it if this suggestion could be considered a supplement to the comments I made in the Resident's Forum at today's meeting. Thanks for your good work

8/6/2010 8:57

The goal says "effective" communication and I guess that includes "timely" but I think "timely" needs to be specifically mentioned. (That reflects my belief that GRF currently isn't making effective use of the Internet in communication.)A resident mentioned email lists. That's part of it.

### **TECHNOLOGY**

July 17, 2010 2:28:58 PM Addition to Vision and appropriate sections within draft

As I suggested today at the excellent presentation made by you / your committee and the DCE firm, a need to address overall IS is missing from the strategy.

All of Rossmoor is significantly affected by the lack of an integrated Information System. The cost to put this right is not trivial and requires a considerable amount of study and the need for an outside firm to be engaged to do such. The cost to Rossmoor of the inadequate non communicating multiple data bases / systems, hand generated data bases, deficiencies

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in defining what each piece of information means from one to another of these, the manual transfer of one piece of needed data to another data base with inherent chance for error is causing extra costs to the coupon each day.

Please take this item into consideration in the final draft. Thanks

7/17/2010 4:18 pm

The entire Board of Directors of Third Walnut Creek Mutual strongly agrees with Mr Sanderson's statement. (re technology).

7/16/2010 5:54 pm

I strongly support improved infrastructure to support each homes technology needs. Technology is quickly developing many support systems for seniors especially those who need additional supports to remain in place as they age. Some of the new applications include video monitoring, dispensing of medication, automatic notification when there is no movement, or when a large weight is on the floor and so on. Many of these enhancements will require that wiring be improved. In long range planning, this should be considered. A solution? Perhaps a single contract that is accessed and paid for by the resident when they choose to update their wiring to support a "connected house".

February 23, 2010 Long Range Planning Task Force members:

My husband, and I spent a few hours, when he returned from the Focus Group he attended, examining the issues the group was charged with discussing.

It seems to me that the Task Force should keep its emphasis on studying what is going to change in the future without trying to tackle shorter-term topics (like committee structure). These are valid issues, but they will impact your ability to anticipate broader trends which will affect Rossmoor in the future. I would like it

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20 Nov 2009 14:53:38 -0800 Planning for a Future Rossmoor

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Here are a few electronic enhancement ideas for your consideration.

If more are needed, please let me know.

1. Wireless Internet service should be available throughout the valley
2. Comcast cable contract should include phone and (lower cost) Internet
3. Good cell phone coverage throughout the valley

3/17/2010 7:14 pm

As a matter of interest to what extent is the LRPTF looking in to the net cost of amenities and the pursuit of alternate revenues to offset such cost?

Are you also looking at the "amenity" of Comcast? That current contract ends in 2012 and we should plan now for alternatives. Specifically I believe the \$35 monthly cost on the coupon to Comcast should be eliminated in favor of negotiated "Rossmoor" rates offered to owners and renters in Rossmoor for self pay. Such an effort could also involve the competitive service providers to offer special deals. Since there is a no cost alternative in broadcast TV why are we defending annual increases in the range of 10% for Comcast. Plus many units are vacant at any given time and there service is still included in the coupon.

I also believe institution of a guest and non-resident fee (with the idea of instituting member user charges per unit of service or time) for many services such as pools and fitness centers should be on the table. Having services available on a no cost basis as we do lessens the members appreciation for the cost of service delivery.

I believe on a long range basis the premise of what services are fee based and which are solely coupon supported should be subject to question, for both resident and non-resident use. This logic would extend to restaurant subsidies as well.

I am sorry that I have missed attending the LRPTF meetings as you have probably all ready plowed these fields. Perhaps you could tell me your conclusion

### **GOVERNANCE**

February 17, 2010

Answers to late survey essay questions by female, born 1919 Very dissatisfied with GRF management. Governed by amateurs. No way for true dissent to be recognized. More recent million dollar property owners have caused a fundamental and psychological divide by pressing for upgrading amenities

February 16, 2010

Answers to late survey essay questions by a resident, female, born 1925.1. Very dissatisfied with GRF management: We have no say in what is built, what needs repaired, what we would like done.! No say in anything. The only reason an entertainment center is forced on us is to impress visitors- residents don't want added expenses to our coupon.

2/11/2010 10:46 pm The Trust Agreement (TA), which largely determines what can and cannot be done, must be taken into account when proposing plans for Rossmoor. The following aspects concerning the TA are probably being included in LRPTF deliberations but I would appreciate it if you would let me add my thoughts to the blend. In all probability, Rossmoor property developers had a large say when the TA was originally written, and again when it was revised in 1970. They likely considered the Lawn Bowling, Pools and Golfing facilities to be effectively "loss leaders", (the "profitable sales" being the sales of new housing units). This original purpose of the TA has been fulfilled and it now fails to reflect current conditions.

The TA should not be the starting point when considering what is best for Rossmoor. It

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should first be determined what is in the best interests of the majority of residents and then secondly, if the TA can be interpreted to accommodate those best interests. (If the answer is no, then it is crucial to proceed at once to do whatever is needed to get the TA updated so that it does serve the best interests of residents).

The fact that the TA is open to interpretation was demonstrated when GRF divested itself of the Medical Center, despite the fact that the TA prescribes that GRF shall operate and manage medical services. The primary reason for transferring these Rossmoor services to a third party was that a large number of residents were not using the facility (many being covered by Kaiser) and they were complaining about having to pay for the increasing cost of the facility on their coupon. A comparable situation exists with respect to the golf courses and the fitness center, each of which could also be transferred to third parties and still be available to Rossmoor residents.

Another TA provision stipulates that the Lawn Bowling users may be charged a reasonable fee - Lawn Bowling costs approximately \$100,000 per year - I contend, that the Trust can be interpreted as requiring, in principle, that any recreational amenity costing more than \$100,000 per year be required to charge user fees, that is for the Fitness Center and Pools (in addition to Golf).

If user fees are considered for the Fitness Center and Pools I do have some suggestions as to how they could be introduced and managed in a reasonable manner.

Again, I would like to thank the LRPTF for it's openness to input from residents and to thank you for your personal time being devoted to our interests.

Date: February 2010 To: Ten Year Planning Task Force

Following are some ideas, comments, suggestions, and questions regarding issues in Rossmoor that I would like to share with you.

Although the GRF and the Mutuals are separate corporations, Mutuals and GRF should work together to help Mutuals to continue their efforts to see that manors, landscape, sidewalks, lighting, and Mutual facility buildings do not fall into decline or disrepair. Standards of maintenance, cleanliness, and disrepair may need to be revised and a clearer description of what is harmonious and up-to-date in appearance both inside and out may need further clarification.

List of Topics – No Date Available:

**#6 What is fiduciary role of GRF's CFO to Mutuals** when attending their meetings and doing their accounting? Should it be enhanced?

1/26/2010 5:03 am

I agree with (name removed) that the LRPTF needs input from people who believe we have enough amenities already. So that the group isn't just negative and saying "no", I suggest they also be tasked with exploring methods of allowing and collecting more user contribution toward the cost of recreational amenities, either before or after the Trust expires. They could also explore the idea of "outside the trust" amenities that GRF would own but would be expected to be completely funded by users. A soaking pool at 92 degrees seems like an example of a candidate for this treatment. As always, thank you for your work for Rossmoor.

17 Nov 2009 08:47:14 -0800 Suggestions for Long Term (or short) Planning

Another point, controversial decisions might benefit from a residential vote rather than the Board making these decisions: e.g. keeping the Dollar pool.

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24 May 2010 16:10:03 +0000

I want to also mention that regarding the tin the Governance section in which I raised concerns about residents not being able to vote in the GRF election because they were "out of town" and not able to receive a ballot at their "out of town" location and / or return said ballot to the vote counting firm in time for the deadline, and had no access to an "absentee ballot" process -- one LRPTF member proposed allowing

the absent resident to vote by PROXY -- i.e. granting PROXY voting power to another resident. This was raised by Clarence Nixon, but not discussed at length.

This would not be a good idea in my opinion, as it could permit organized groups to approach various residents (especially older and more infirm)

residents and coach them into granting them their PROXY. This could lead to ballot stuffing of the first order, and I think should be discussed as

Old Business at our next meeting and DC&E asked to not include that as a proposal in our Plan submission.

4/27/2010 12:04 pm

At the Long Range Planning Task Force Meeting on April 21st it was categorically and very emphatically stated that Rossmoor residents do not have any legal standing relative to GRF's Trust Agreement. This may be a fact. If so, this lack of legal standing is not widely recognized within the general Rossmoor population and could well be the cause of significant resident dissatisfaction. Although Residents' Forums are featured at some meetings and correspondence from residents is sometimes answered there is a general belief that resident's opinions are not fully taken into account. This situation could well have come about because of the resident's lack of legal standing with GRF. A suitable revision to the Trust Agreement and/or bylaws could be required to formally rectify this situation.

Currently, each Mutual has legal standing relative to GRF's Trust Agreement and the extent of a resident's legal standing with each Mutual may vary. For residents views to be properly considered there is an existing need for each Mutual to be receptive to resident's views and, when appropriate, represent these to GRF, pursuing them to a satisfactory resolution. At the present time it appears that each Mutual may or may not consider itself responsible, when appropriate, for adopting resident's proposals and representing them to GRF for resolution. Possibly, modified or additional procedures, communication vehicles and/or meetings are needed to satisfy this deficiency. May I suggest that this aspect be specifically considered at the LRPTF meeting on May 19th, 2010 when the subject is to be Governance and Communication.

8/6/2010 8:57 I watched it (Town Hall) on Ch 28 today. Good show. Only a few comments.  
Governance Mary England got kinda blown off with her question about interdependence.

Dots There are tales that people put all 10 of their dots on the same thing....David did say to put one dot only on an item...but what really happened? I saw one person put two dots on gardening. Does that invalidate the exercise? I think it does. Single issue voters can really skew things.

### **HOUSING AND MUTUALS**

**No items**

# APPENDIX I

## IDEAS OFFERED BY INDIVIDUAL RESIDENTS

### IMPLEMENTATION

8/1/2010 2:02 pm and clarified in second email later in day.

Thanks for the opportunity to review the Goals, policies and actions list. If it's not too late, here are my top 10.

First I need to say that I didn't see anything that looked like a really bad idea so it's hard to come up with only 10 as top priority. I did see one or two that could use some expansion.

Here we go, and these are not in priority order

Group 1, issues that really are mutual focused and probably older-mutual focused. Basically, the older housing stock needs updating. Mutuals don't seem to be addressing that.

Policy Env1.6, Policy HMU 2.3, Policy HMU 2.4,

Group 2, Finance Policy Fin 2.1, Policy Fin 1.3, Policy Fin 1.14 (outsourcing). I would expand this to include something about benchmarking our costs against costs of similar organizations

Others: Action FAC 3.1, Policy FAC 1.9, Action GOV 1.2, especially looking into more user fees and less coupon support.

Policy COM 1.2 Need a method of communicating almost real time with those who are interested in a particular subject. That's 10.

8/11/2010 Long Range Plan - Task Rankings

This report supplements task weightings and rankings established in July 2010 by the Long Range Planning Task Force's (LRPTF) by comparing them with the statistically representative section of BW Research Partnership's Residents Survey dated March 2010.

**OBJECTIVE** To assist in ensuring that the Statistically Representative of the March 2010 Resident's Survey (Appendix A) is appropriately taken into account when the most important tasks are nominated in the Long Range Plan.

**METHOD** The initial Policy or Action task "tallies" (weightings) and rankings assigned at the 7/28/10 LRPTF meeting with Appendix A (the only section of the Survey Report limited to statistically representative results), of the 2010 Resident's Survey were used as the basis for this report.

#### CONTENTS

Page 2 – Rankings by Task Force 7/28/2010

Page 3 – Listing of those 7/28/10 "Top 12" Policy or Action items that were not included in Survey.

Page 4 – Table of applicable survey results from Appendix A, pages 7,8 and 10 of the Residents Survey

Page 5 – Bar Chart showing weightings derived for the applicable survey results.

Page 6 – Table and Bar Chart comparing tasks included in both the 7/28/10 "Top 12" and the Survey

Page 7 – Comparison of Survey items not included in 7/28/10 List - using Common item (Event Center) as base weight.

#### Rankings by Task Force 7/28/2010

<u>Top 12 Rankings</u>				<u>Rankings #13 to #38</u>			
<u>Tally</u>	<u>Rank</u>	<u>Description</u>	<u>CODE</u>	<u>Page</u>	<u>Tally</u>	<u>Rank</u>	<u>Description</u>
	<u>#</u>					<u>#</u>	
42	1	Complete Creekside Master Plan	A 5-1.3	7	10	13	Closed Circuit TV for security
42	2	Master Plan all GRF Facilities before new fac.	A 5-1.6	8	10	14	Dev. Emergency Disaster Plan
34	3	Revise Trust Agreement prior to 2024	A 11-1.2	21	9	15	Communicate in Timely Manner
32	4	GRF Committee to review Gen Plan Implem.	A 11-3.1	22	9	16	Ad Hoc Task Force to reassess Gen Plan
31	5	Expand Fitness Center	A 5-1.4	7	9	17	Review opportunities to increase revenue
23	6	Keep GRF portion of coupon low as poss.	P 12-2.1	24	8	18	Study Tice Creek
18	7	Use Trust Agreement or alternative	P 11-1.3	20	8	19	Enhance Bus connections with local transportation
16	8	Coordinate plans from organized groups	A 5-1.9	8	8	20	Allow private & GRF commercial activity
15	9	Study valleywide WiFi	A 5.3.1	9	8	21	Use updated, new Technology

**APPENDIX I**  
**IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

13	10	Develop Table Tennis Facility	A 5-1.5	7	7	22	Evaluate Security Incidents
13	11	Balance activities for active & limited residents	P 9-1.1	16	7	23	Enhance Rossmoor's Image - marketing
10	12	Review Bus services regularly	A 6.2.1	12	6	24	Conduct Annual Audits
					6	25	Review Employee Benefits
					5	26	Work w C.C. Fire Dept. Re fire breaks
					5	27	GRF & Mutuals coordinate defensible space
					4	28	Improve Golf course Bathrooms
					3	29	Expand Commercial Services
					3	30	Expand transportation options for residents
					3	31	Consolidate Mutuals
					2	32	Evaluate Composting Mulching
					2	33	Guest fees for use of facilities
					2	34	Roadway evaluation & traffic calming
					2	35	Evaluate Communication with residents
					1	36	Publicize Energy Saving Ideas
					1	37	List of Open Space for development
					1	38	Coordinate emergency /disaster efforts

**7/28/10 "Top 12" Policy or Action items not included in Survey**

<u>Chapter</u>	<u>Matrix</u>		<u>LRPTF</u>	
<u>Ref. #</u>	<u>Page #</u>	<u>Description</u>	<u>Rank</u>	<u>Tally</u>
A 5-1.6	8	Master Plan all GRF Facilities before new facilities	2	42
A 11-1.2	21	Revise Trust Agreement prior to 2024	3	34
A 11-3.1	22	GRF Committee to review Gen Plan Implementation	4	32
P 11-1.3	20	Use Trust Agreement or alternative	7	18
A 5.3.1	9	Study Valley-Wide WiFi	9	15

## APPENDIX I IDEAS OFFERED BY INDIVIDUAL RESIDENTS

A 5-1.5	7	Develop Table Tennis Facility	10	13
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Table of applicable survey results from Appendix A, pages 7, 8 and 10 of the Residents Survey (Don't Know"/"No Answer" are filtered out)

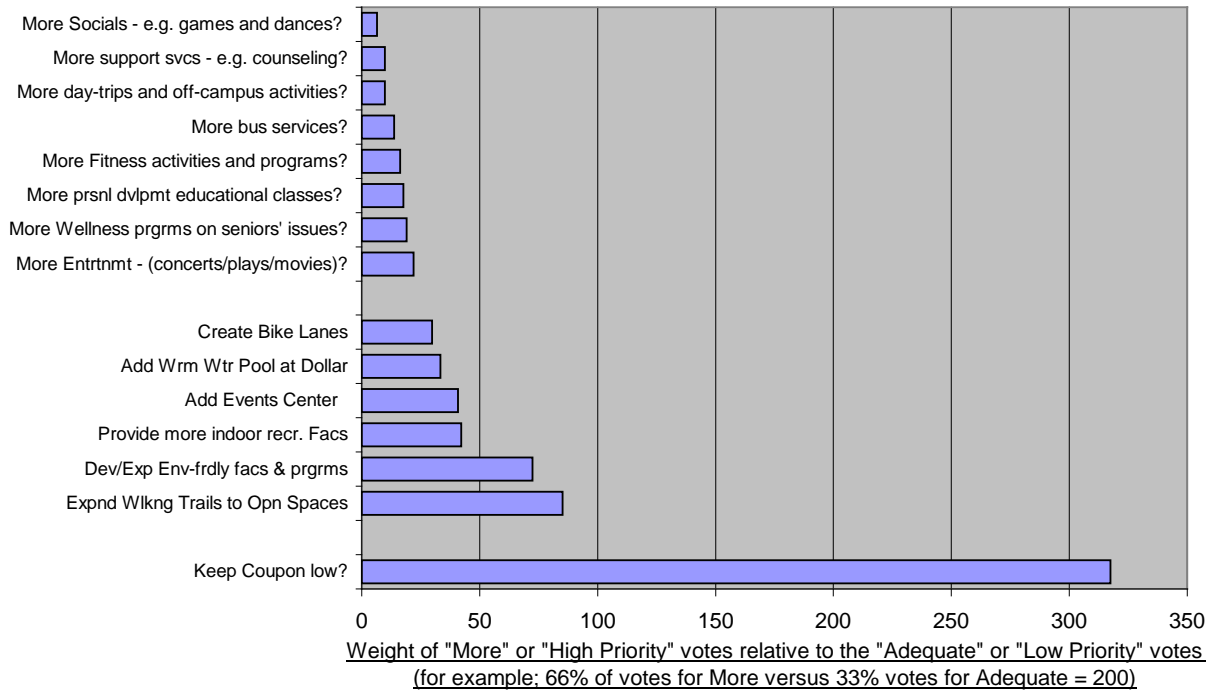
Chapter Matrix  
Ref # Page #

		<u>Percentages of Responses Received</u>		<u>Weight of "High/More"</u>	
		<u>Increase not O.K.</u>	<u>A few extra dollars</u>	<u>votes relative to the</u>	
		<u>for add'l services</u>	<u>O.K. for added quality</u>	<u>"Low/Adequate" votes</u>	
				<u>(Derived from Survey)</u>	
	A-10	Questions asked:-			
1	A-10	Keep Coupon low?	73%	23%	317
	A-8	Available responses:-			
			<u>High Priority</u>	<u>Low Priority</u>	
2	A-8	Expand Walking Trails to Open Spaces	46%	54%	85
3	A-8	Dev/Exp Environmentally friendly facilities & programs	42%	58%	72
4	A-8	Provide more indoor recreational Facilities	30%	71%	42
5	A-8	Add Events Center	29%	71%	41
6	A-8	Add Warm Water Pool at Dollar House	25%	75%	33
7	A-8	Create Bike Lanes	23%	77%	30
	A-7	Available responses:-			
			<u>More needed</u>	<u>Currently Adequate</u>	
8	A-7	More Entertainment - (concerts/plays/movies)?	18%	82%	22
9	A-7	More Wellness programs on seniors' issues?	16%	84%	19
10	A-7	More personal development educational classes?	15%	85%	18
11	A-7	More Fitness activities and programs?	14%	86%	16
12	A-7	More bus services?	12%	88%	14
13	A-7	More day-trips and off-campus activities?	9%	91%	10
14	A-7	More support services - e.g. counseling?	9%	91%	10
15	A-7	More Socials - e.g. games and dances?	6%	94%	6

# APPENDIX I

## IDEAS OFFERED BY INDIVIDUAL RESIDENTS

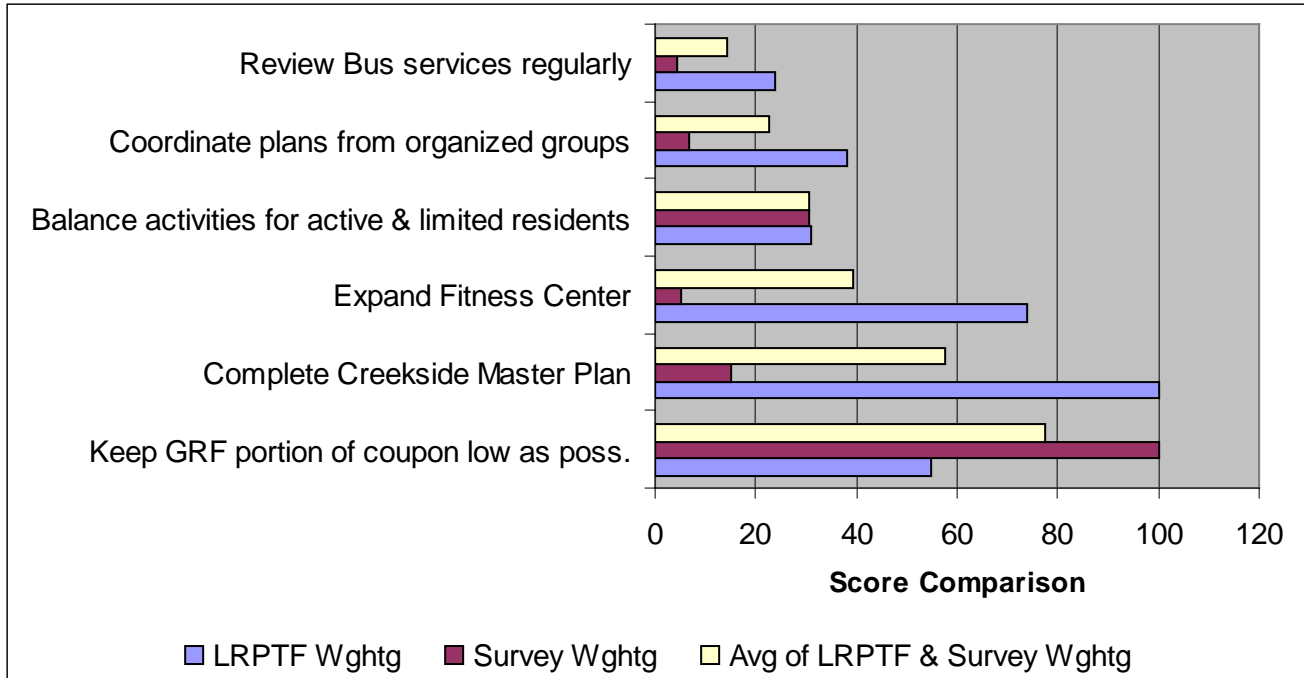
**Bar Chart showing weightings derived for the applicable survey results.**



**Comparison of Tasks included in both the LRPTF's "Top 12" and the Survey**

Chapter	Matrix	Description	LRPTF		Resident Survey		Stabilized Score expressed as %age of Tally & Wghtg			Stabilized
			Tally	Rank	Weighting	Rank	LRPTF	Survey	Total	Rank
P 12-2.1	24	Keep GRF portion of coupon low as poss.	23	6	317	1	55	100	77	1
A 5-1.3	7	Complete Creekside Master Plan	42	1	48	3	100	15	58	2
A 5-1.4	7	Expand Fitness Center	31	5	16	5	74	5	39	3
P 9-1.1	16	Balance activities for active & limited residents	13	11	97	2	31	31	31	4
A 5-1.9	8	Coordinate plans from organized groups	16	8	22	4	38	7	23	5
A 6.2.1	12	Review Bus services regularly	10	12	14	6	24	4	14	6

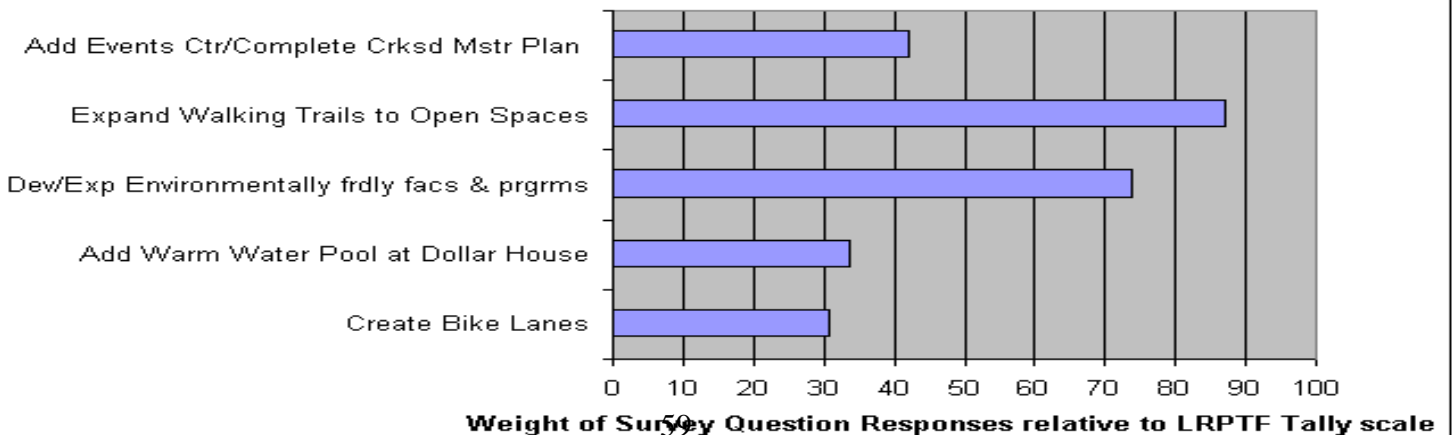
## APPENDIX I IDEAS OFFERED BY INDIVIDUAL RESIDENTS



**Compare Survey items not included in 7/28/10 List - using Common item (Event Center) as base weight**

("Don't Know"/"No Answer" responses are filtered out)

Ref #	Page	Derived Weight of			LRPTF	
		High Priority	Low Priority	High Priority relative to Low Priority Votes	Tally	
A-8 Available responses:-						
<b>Only Survey Question also included in LRPTF "Top 12":</b>						
5	A-8	Add Events Center/Complete Creekside Master Plan	29%	71%	41	42
<b>Other Survey Questions not included in LRPTF List:</b>						
2	A-8	Expand Walking Trails to Open Spaces	46%	54%	85	87
3	A-8	Dev/Exp Environmentally friendly facilities & programs	42%	58%	72	74
6	A-8	Add Warm Water Pool at Dollar House	25%	75%	33	34
7	A-8	Create Bike Lanes	23%	77%	30	31



## **APPENDIX I**

### **IDEAS OFFERED BY INDIVIDUAL RESIDENTS**

9/1/2010 11:11 pm >>>

At today's LRPTF meeting I was kindly asked for suggestions relative to the Task Rankings Analysis I presented at the 8/11/2010 meeting. It seems to me that it would be good idea to more specifically recognize the effort put into the Community Survey and particularly the value of the statistically representative portion.

The Task Rankings Analysis clearly indicates that residents consider keeping the coupon low to be approximately four times more important than any other aspect addressed in the statistically representative portion. The LRPTF 7/28 rankings have also assigned a high importance (rank #6) to this viewpoint.

However, if my understanding is correct, the second most highly ranked item in the statistically representative portion (expand walking trails to open spaces) has not been addressed as an action item in the Plan. If I am correct in this understanding then I would suggest that a corresponding action item be added, thus acknowledging the importance of representative residents' opinions and the significance of the Survey.

Other items addressed in the statistically representative portion of the survey and the Task Rankings Analysis have significantly lower rankings, have probably been considered by the LRPTF and, if appropriate, are included in the Plan. Thanks for this opportunity to contribute.