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.

GR²: 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 having 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 Mutuals.

♦ 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 Mutuals.

♦ Trust Beneficiary: Persons or legal entities, such as Mutuals, 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.
APPENDIX B

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APPENDIX B

BIBLIOGRAPHY

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APPENDIX C

COMMUNITY SURVEY REPORT

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
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:

- 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.
APPENDIX 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.
JUNE 22, 2010 MEMO FROM SALMONS RE: SITE TOUR
DATE: June 22, 2010

TO: Ad Hoc Long-Range Planning Task Force

FROM: Warren Salmons, CEO 🌲 🌿

SUBJECT: Site Tour

This memorandum represents the collective report from the Task Force Sub-Committee, Rcn 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
APPENDIX F

NINE FOCUS GROUP SUMMARY – FEBRUARY AND MARCH 2010
APPENDIX F

FOCUS GROUPS AND PRESENTATION SUMMARIES

Nine Focus Groups were held:
- 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:
- 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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Summaries for all Focus Groups and most presentations are available at the GRF administrative offices.
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
Appendix G

Ideas/Plans Offered by Organized Groups
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, Counselling 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 prosenium 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 prosenium model with ample room behind the set for dressing rooms and storage. This model would probably be considerably more economical than the prosenium 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 courtesies 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.

- **MASSAGE 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 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.

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**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 bns 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.

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**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

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

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
Appendix H

Task Force Suggestions to Consider in Developing an Overall Master Plan for GRF Facilities
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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 permanent indoor table tennis and pickle ball facility vs Del Valle.
   b. Consider replacing grass lawn bowling greens with artificial turf.

Del Valle
1. Master Plan long term uses of Del Valle facilities, including parking:
   a. Consider short term and long term options to expand Fitness Center.
   b. Consider indoor table tennis and pickle ball including vs Hillside.

Creekside
1. Complete the Master Plan for Creekside as adopted by the GRF Board and approved by Walnut Creek:
   a. Build planned Events Center to add 18,200 sq. ft. building for cultural, educational and social events.
   b. Build planned Pro Shop to add 1,730 sq. ft.
   c. Build new parking lot on the south of Stanley Dollar Drive.
2. Determine future of outdoor tennis and pickle ball courts: update including perimeter fencing, surfacing etc.
3. Determine golf practice areas in relation to all of above

Dollar Clubhouse
1. Master Plan long term uses of Dollar Clubhouse and grounds:
   a. Update Dollar Clubhouse
   b. Elevator for improved access

Gateway Clubhouse
1. Update multi-purpose rooms, Redwood Room, Fireside Room and other areas.

MOD
1. Update buildings and grounds as needed.
Garden and RV Areas where individual residents have exclusive use of land
1. Update miscellaneous facilities such as lots, buildings, infrastructure, etc.

Golf Course
1. Update restrooms
2. Repair golf cart crossing
3. Install water well
4. Transition to drought tolerant landscaping
5. See also Creekside #3

Buckeye and Tee House
1. Master Plan area for tennis, golf and parking.

Valleywide
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).
   g. Consider food service options at all venues.