

## 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

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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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<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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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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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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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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<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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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, Mutuals, 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 Mutuals, 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

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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

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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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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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<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+

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