

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. It was reviewed, amended and adopted in final form by the GRF Board of Directors as the General Plan for Rossmoor. Because so much time and money was invested in

producing the Plan, the implementation of the Plan should be carried out in a timely and organized manner.

A 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. 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

Goal IMP-1	A GRF that responds to current conditions and looks ahead to anticipate Rossmoor's future needs.
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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)
ENVIRONMENT AND SUSTAINABILITY				
Goal ENV-1: Conservation of energy and non-renewable resources within Rossmoor.				
Policy ENV-1.1	Review programs and funding options on an on-going basis to find feasible approaches to energy conservation and renewable energy.	Mutual/Trust Operations Staff		Ongoing
Policy ENV-1.2	In new construction and remodels, meet State energy efficiency standards.	Staff	GRF Project Manager	Ongoing
Policy ENV-1.3	New construction, remodels, and landscaping projects should minimize paved areas and use absorptive paving materials to minimize heat island effects.	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	Choose Rossmoor fleet vehicles that are the lowest-polluting and most energy efficient available under the funding programs that support their purchase.	Vehicle Maintenance Foreman		Ongoing
Policy ENV-1.6	Publicize energy-saving ideas, including the 'Hot Day Program,' through the Rossmoor News and similar community-wide outreach.	Communications Sr. Manager		Ongoing
Action ENV-1.1	Consider implementation of the recommendations of the Alternative Energy Committee and successor committees on an on-going basis as funds are available.	Mutual/Trust Operations Staff	GRF Project Manager	5+
Action ENV-1.2	Create an administrative policy that makes energy conservation part of every employee's job.	GRF CEO	HR Sr. Manager	1
Action ENV-1.3	Establish energy-saving policies for GRF fleet vehicles, including reducing idling times, reviewing routes for efficiency, and utilizing cost-effective non fossil fuel energy sources.	GRF CEO	Vehicle Maintenance Foreman	2

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Goal ENV-2: Minimal use of toxic materials throughout the community.				
Policy ENV-2.1	Use low- or no-toxicity building materials in landscape maintenance, new buildings, and building remodels where feasible.	Mutual/Trust/Golf Operations Staff	Project Manager	Ongoing
Policy ENV-2.2	Substitute organic or non-toxic housekeeping products at all GRF locations when feasible.	Resident Services Director	Custodial Supervisor	2
Goal ENV-3: Water conservation throughout the community.				
*Policy ENV-3.1	Seek to reduce water demand for landscaping, including implementing landscaping standards developed by the City of Walnut Creek and East Bay Municipal Utility District.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing
Policy ENV-3.2	Publicize water-saving ideas through the Rossmoor News and similar community-wide outreach.	Communications Sr. Manager		Ongoing
Action ENV-3.1	Explore additional opportunities for use of non-potable water for landscape irrigation.	Landscape Manager	Golf Supervisor	3-5
Goal ENV-4: Protection of biological resources in Rossmoor.				
Policy ENV-4.1	Educate residents and employees about landscaping that provides habitat for sensitive species found in Rossmoor, and to the extent 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		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	Ongoing
Goal ENV-5. Balance between the enjoyment, the practicality, and the health issues of living with wildlife.				
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		Ongoing

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Policy ENV-5.2	Educate residents about the impacts of feeding wildlife.	Staff		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		2
Action ENV-5.1	Minimize the presence of goose and turkey populations to address safety and cleanliness issues.	Director of Mutual/Trust Operations	Landscape Manager	2
Goal ENV-6: Reduced waste generation in Rossmoor through creative solutions to waste management.				
Policy ENV-6.1	Purchase and use recycled materials whenever feasible.	CEO	GRF Staff	Ongoing
Policy ENV-6.2	Expand the range of materials recycled at Rossmoor as new recycling programs become available.	CEO	GRF Staff	1
Policy ENV-6.3	Expand recycling programs in GRF buildings, with a focus on educating residents and providing 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.	Resident Services Director	Custodial/ Recreation Supervisors	1
Action ENV-6.1	Expand hazardous waste collection options and information.	CEO	GRF Staff	2
Action ENV-6.2	Evaluate opportunities to market green waste, which we do not already reuse onsite, to outside vendors for chipping, composting or other uses.	Director of Trust/Mutual Operations	Landscape Manager	2
Action ENV-6.3	Develop a program with an outside agency to accept recycled household goods.	CEO	Resident Services Director	1
OPEN SPACE AND LANDSCAPING				
Goal OSL-1: Open space areas that buffer Rossmoor from surrounding development.				
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		Ongoing

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Policy OSL-1.2	Look for opportunities to acquire adjacent property or excess Mutual land.	CEO		Ongoing
Goal OSL-2: Open space areas that provide opportunities for active and passive enjoyment.				
Policy OSL-2.1	Enhance views of Rossmoor's open space areas.	CEO		Ongoing
*Policy OSL-2.2	Support the Trails Club's efforts to provide mapping, appropriate expansion, and maintenance of trails within Rossmoor's open space areas.	Director of Mutual/Trust Operations	Resident Services Director	2
Policy OSL-2.3	Ensure new uses of GRF's open space do not detract from the overall attractiveness of the open space area.	CEO		Ongoing
Goal OSL-3: Well-maintained open space areas.				
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 Coordinator	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.	CEO		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
Goal OSL-4: Landscaping throughout Rossmoor that provides natural beauty, and is both durable and environmentally-friendly.				
Policy OSL-4.1	Provide attractive, sustainable, and colorful landscaping for Trust facilities and properties.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing

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*Action OSL-4.1	Update GRF landscaping, including lawns, planting areas, trees, and irrigation systems, with consideration of transitioning landscaping to more drought-tolerant plants.	Director of Mutual/Trust Operations	Landscape Manager	Ongoing
FINANCE				
*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 possible.				
*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.			
*Policy FIN-1.2	Keep the GRF portion of the Coupon as low as possible while providing a range of basic 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	Engage a qualified audit firm to conduct an annual audit using current recommended professional association guidelines.	Audit Committee	CFO	Ongoing
Policy FIN-1.4	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-1.5	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
Policy FIN-1.6	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.	GRF Board Finance Committee	CFO-CEO	Ongoing

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*Policy FIN-1.7	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-1.8	Systematically maintain GRF buildings and facilities to prolong their useful lives so long as that remains cost-effective.	Director of Mutual/Trust Operations	Trust and Custodial Staff	Ongoing
Policy FIN-1.9	Consider the costs and benefits of construction of new GRF facilities versus maintenance and upgrades for existing facilities.	GRF Board Finance Committee	CFO-CEO	Ongoing
Policy FIN-1.10	Enhance manor sales and associated Membership Transfer Fees and dedicate the fees to fund capital projects.	GRF Board Finance Committee	CFO-CEO	Ongoing
Policy FIN-1.11	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-1.12	Review GRF 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 Sr. Manager	1
Action FIN-1.1	Periodically evaluate services provided by GRF staff to assess whether services could be outsourced to contractors without sacrificing quality or other aspects of the services important to Rossmoor residents and if cost savings can be effected.	GRF Board Finance Committee	CFO-CEO	3-5
Goal FIN-2: An organizational culture that continually seeks entrepreneurial opportunities and expanded revenues consistent with the needs and expectations of Rossmoor residents.				
*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 basic 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
*Policy FIN-2.2	Use the budgeting process and "outside" revenue enhancement to provide programs and services to residents and minimize increases to the GRF Coupon.	GRF Board Finance Committee	CFO-CEO	Ongoing

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*Policy FIN-2.3	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+
Policy FIN-2.4	Utilize transparent annual budgeting and auditing processes, including development of Board budget principles, to ensure a fiscally sound GRF that provides cost-effective facilities and services.	GRF Board Finance Committee	CFO-CEO	Ongoing
*Action FIN-2.1	Review ideas for revenue enhancement, including those presented in this Plan, to determine which should be implemented consistent with GRF policies.	GRF Board Finance Committee	CFO-CEO	Ongoing
Action FIN-2.2	Improve marketing of Rossmoor to enhance manor sales and associated Membership Transfer Fee revenue.	Communications Sr. Manager	CEO	Ongoing
FACILITIES				
Goal FAC-1: Modern facilities that meet the needs of Rossmoor residents.				
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.	Resident Services Director	Custodial Supervisor/ Trust Maintenance Staff	Ongoing
*Policy FAC-1.2	Maintain and enhance the parks and golf courses as landscaped open area focal points.	Landscape Manager	Golf Supervisor	Ongoing
*Policy FAC-1.3	Create a Facilities Master Plan covering all major sites and considering usage, accessibility, storage, food service, etc. that meets 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	Design new GRF facilities with reduced maintenance costs in mind, including green building, infrastructure, and energy conserving aspects, while ensuring high quality design.	Project Manager		Ongoing

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*Policy FAC-1.5	Provide access and usage of GRF facilities/properties for active residents as well as those with disabilities.	Resident Services Director		Ongoing
Policy FAC-1.6	Update interiors of GRF facilities on a routine basis to ensure high quality.	Resident Services Director		Ongoing
Policy FAC-1.7	Provide on-site food service at appropriate GRF facilities.	Resident Services Director		Ongoing
Policy FAC-1.8	Work with the Acalanes Union High School District to explore use/purchase of the former Del Valle High School facilities.	CEO		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.	CEO		5+
*Action FAC-1.2	Complete the Creekside Master Plan.	GRF Board	CEO	5+
*Action FAC-1.3	Remodel Del Valle Clubhouse to accommodate an expanded and enhanced Fitness Center, meeting spaces, and other facilities as needed.	GRF Board	CEO	5+
*Action FAC-1.4	Develop a permanent table tennis facility.	GRF Board	CEO	2-3
Action FAC-1.5	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
Action FAC-1.6	Explore additional parking at existing GRF facilities, including converting some areas to parking for golf cars and other small types of vehicles.	Project Manager		3-5
Goal FAC-2: A balance between the competing demands for facility use.				
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

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Policy FAC-2.2	Permit 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	Resident Services Director	Ongoing
Policy FAC-2.4	Use current, 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
Goal FAC-3: Utilities that provide adequate capacity to meet Rossmoor's needs.				
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
TRANSPORTATION				
Goal TRA-1: A safe and user-friendly roadway system that provides for vehicle travel in Rossmoor and connects to outside roadways.				
Policy TRA-1.1	Maintain the existing roadway network in good physical condition.	Director of Mutual/Trust Operations		Ongoing
Policy TRA-1.2	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.	Director of Mutual/Trust Operations	Public Safety Coordinator	Ongoing
*Policy TRA-1.3	Consider expanding transportation mobility options for Rossmoor residents, including options such as electric cars, bicycles, golf-cars, car-pooling, car-sharing, shuttle services, and new transportation technologies.	Resident Services Director		Ongoing
Policy TRA-1.4	Enforce the California Vehicle Code and Walnut Creek Municipal Code on Rossmoor's streets through the City of Walnut Creek.	Public Safety Coordinator		Ongoing

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Action TRA-1.1	Study existing intersections and entries to the roadway network to determine where operational improvements could enhance safety, including restriping lanes, stop signs, and other signage and mirrors to expand visibility.	Director of Mutual/Trust Operations	Public Safety Coordinator	2
Action TRA-1.2	Study existing GRF parking lots, including counting parking usage, to determine if and where additional handicapped and golf-car 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.	Director of Mutual/Trust Operations	Project Manager	3-5
Action TRA-1.3	Develop a program 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 Coordinator		Ongoing
Action TRA-1.4	Develop a program to place enforcement devices, such as speed signs, and speed reduction devices, such as speed tables and bumps, on targeted roadways when indicated by measured speeds and accident rates.	Public Safety Coordinator		Ongoing
Action TRA-1.5	Study the provision of new or improved facilities for golf-car circulation either on or parallel to the Valley's major streets.	CEO		5+
Goal TRA-2: A transit system that provides access for Rossmoor residents within Rossmoor and connections to key outside destinations.				
*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. Modify routes based on available funding and usage.	Resident Services Director		Ongoing
Policy TRA-2.2	Provide 'Travel Training' for first-time bus users and other outreach to familiarize residents with the bus system.	Bus Driver Forewoman		Ongoing

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*Action TRA-2.1	Engage an outside firm to analyze the bus system in order to maximize its efficiency, cost-effectiveness, and usefulness to residents. (Last studied in 1995)	Resident Services Director		2
Goal TRA-3: Appropriate transportation facilities for pedestrians, cyclists, and disabled persons.				
Policy TRA-3.1	Provide and maintain sidewalks and pedestrian paths throughout Rossmoor focusing on pedestrian safety.	Director of Mutual/Trust Operations		Ongoing
Policy TRA-3.2	For all new construction or major building renovations, meet ADA requirements and utilize 'Universal Design' and similar techniques to ensure access for persons with disabilities.	Director of Mutual/Trust Operations	Resident Services Director	Ongoing
Action TRA-3.1	Evaluate existing roadways and intersections to determine where they could be modified for pedestrian safety and comfort. Consider traffic calming ideas including striping, medians, and narrowing of intersections, as well as approaches that would make the roadways and intersections more user-friendly.	Director of Mutual/Trust Operations	Public Safety Coordinator	Ongoing
Action TRA-3.2	Evaluate connections between existing open space trails and residential areas, sidewalks, and community facilities.	Resident Services Director	Public Works Administrator	5+
SECURITY				
Goal SEC-1: A safe and secure community.				
*Policy SEC-1.1	Balance 24-hour security with convenient access and privacy for residents.	Policy Committee	Public Safety Coordinator	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 Coordinator		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 Coordinator	3-5

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*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 Coordinator		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 Coordinator		1
Action SEC-1.2	Investigate development of a second entry/exit for resident use.	Director of Mutual/Trust Operations		5+
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 Coordinator		Ongoing
Goal SEC-2: An ability to respond to emergencies and disasters.				
Policy SEC-2.1	Maintain the capacity for GRF to provide first-response to emergencies.	GRF Board	Public Safety Coordinator	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 Coordinator		Ongoing
Policy SEC-2.3	Ensure emergency access routes are clear and coordinated with neighboring property owners.	Public Safety Coordinator		Ongoing
*Policy SEC-2.4	Work with the Mutuels 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 Coordinator		Ongoing

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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 Coordinator		Ongoing
*Action SEC-2.2	Develop an Emergency Disaster and Preparedness Plan and an implementation program which describes how GRF, the Mutuals, various resident emergency response organizations, and Rossmoor residents will work together to implement the Plan. The Plan shall include procedures for disaster response scenarios, shelter in place, evacuation, and transport.	Public Safety Coordinator	GRF Board	I
WELLNESS				
Goal WLN-1: An environment that supports residents in maintaining their independence as well as their social, emotional, and physical well-being.				
*Policy WLN-1.1	Coordinate programs and services to facilitate residents in maintaining their health and independence, with special attention to residents that need some assistance to age in place.	Counseling Recreation Public Safety		Ongoing
Policy WLN-1.2	Provide referrals to service providers that can help residents remain in Rossmoor or transition successfully to other housing.	Counseling		Ongoing
Policy WLN-1.3	Encourage the use of in-home caregivers who assist residents with staying in their homes.	Counseling		Ongoing
Policy WLN-1.4	Support the fitness center and other recreational facilities, and services that promote an active, healthy lifestyle.	GRF Board		Ongoing
Policy WLN-1.5	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, peer support, and short-term financial-aid to needy residents.	Resident Services Director	Recreation Supervisor	Ongoing
Policy WLN-1.6	Continue using counseling services to provide short-term review of financial need for those undergoing financial hardship.	Counseling Services		Ongoing

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Action WLN-1.1	Create an ongoing program to publicize information regarding wellness services, including a directory that catalogs information regarding services that are available.	Counseling Services		Ongoing
Action WLN-1.2	Develop a program to increase coordination between residents and Counseling Services or similar entities so as to help neighbors check in on one another and increase social interaction.	Counseling Services		2
SOCIAL AND RECREATIONAL PROGRAMS AND LOCAL AMENITIES				
Goal SRP-1: A wide range of social, cultural, and recreational opportunities appealing to the diversity of Rossmoor residents.				
*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	CEO	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.	Resident Services Director	Recreation Supervisor	Ongoing
Policy SRP-1.3	Encourage volunteerism by identifying and publicizing volunteer opportunities.	Resident Services Director	Volunteer Coordinator Communications Sr. Manager	Ongoing
Policy SRP-1.4	Provide a travel and excursion program on a cost-recovery basis which may expand or reduce the program as usage and interest indicate.	Resident Services Director	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.	Resident Services Director	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.	Resident Services Director	Recreation Supervisor	Ongoing

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Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
Action SRP-1.1	Implement an outdoor activity during the warm months on a cost recovery basis; which should be focused on food and be broadly desirable to all residents.	Resident Services Director	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.	Resident Services Director	Recreation Supervisor	1
Action SRP-1.3	Work with the Activities Council to assess current locker storage needs for clubs and organizations and assess an annual fee for locker use.	Resident Services Director	Recreation Supervisor	2
Goal SRP-2: Cultural and educational programs that provide opportunities for life-long enjoyment and learning.				
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.	Resident Services Director	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.	Resident Services Director	Recreation Supervisor	2
Policy SRP-2.3	Provide space and organizational support for the Rossmoor libraries. Explore ways to update library technology to meet the needs of current and future library patrons.	Resident Services Director		3-5
COMMUNICATION				
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.				
*Policy COM-1.1	Maintain open, clear, and timely lines of communication that flow freely among residents, including standing and <i>ad hoc</i> committees, the Mutuals, and local and State government. Internally communicate with residents via Rossmoor News, TV channel, Rossmoor websites, and GRF Board and committee meetings.	GRF Board	CEO	Ongoing

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Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
Policy COM-1.2	Approach communication in a spirit of openness and sharing, recognizing that the community exists for its residents and a well informed community benefits all.	GRF Board	CEO	Ongoing
*Action COM-1.1	Review communication techniques, e.g. the Rossmoor News, TV channel and the Rossmoor websites continuously to ensure that communication is as effective as possible.	Communications Sr. Manager		2
*Action COM-1.2	Enhance marketing of Rossmoor by use of a pilot program for public relations and marketing, created by professionals, to develop "branding," to enhance the positive image of Rossmoor and to promote the sale of residential units.	Communications Sr. Manager		2
Action COM-1.3	Facilitate resolution of communication issues among residents through the counseling services provided by GRF.	Counseling Services		Ongoing
TECHNOLOGY				
Goal TEC-1: Use current integrated technology that enhances convenience and efficiency in the provision of GRF services and facilities.				
*Policy TEC-1.1	Use appropriate, current technology to improve efficiency and convenience in providing services and running facilities at Rossmoor.	CFO	Information Systems Manager	Ongoing
*Action TEC-1.1	Establish a continuing relationship with a technology consulting firm.	CFO	Information Systems Manager Consultant	2
Action TEC-1.2	Periodically review current technology to identify opportunities to apply such technology throughout Rossmoor, assuring integration among all potential users.	CFO	Information Systems Manager	Ongoing
Action TEC-1.3	Stay current on 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

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Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
Action TEC-1.5	Conduct a study to determine the feasibility of utilizing a comprehensive, secure, and fail-safe wireless network to provide video, voice, and data transmission links to support GRF's governance, administrative, and security functions as well as resident telephones, internet, and TV needs.	CFO	Information Systems Manager	2
GOVERNANCE				
*Goal GOV-1: Transparent, representative governance that is responsive to the needs of the Mutuels and Rossmoor residents.				
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 or alternative governing method 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	Create 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	Communications Sr. Manager	2

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Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
*Action GOV-1.2	<p>Establish a procedure for revising the Trust Agreement, or alternative governing method, well in advance of expiration on April 1, 2024. The revision should include both updates to reflect current conditions as well as a review of how the Trust Agreement's governance structure is meeting Rossmoor's current needs. Examples include but are not limited to:</p> <ul style="list-style-type: none"> ◆ Assure continuity by long-term assignments of individual participants in the revision process. ◆ Assure a Trust agreement is continuously in place during the revision process. ◆ Consider expanding input from the community members in decision making for major capital expenditures. ◆ Evaluate the policy of user fees for services. 	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.	Communications Sr. Manager	Executive Services Sr. Manager	1
Goal GOV-2: Participation by Rossmoor residents in GRF governance.				
*Policy GOV-2.1	Ensure that residents have appropriate opportunities to participate 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

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Action GOV-2.2	Expand the training and orientation program for GRF Board members and others in GRF leadership positions.	CEO		Ongoing
HOUSING AND MUTUALS				
Goal HMU-1: A productive working relationship between GRF and all Mutuals in Rossmoor.				
Policy HMU-1.1	Recognize and respect the independence of the Mutuals in their role within the community.	GRF Board	Mutual Liaison Committee	Ongoing
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	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	CEO	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	I
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	I
Goal HMU-2: Homes that are well-maintained, safe, and retain their value.				
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		Ongoing
Policy HMU-2.2	Support Mutuals seeking to reconfigure for enhanced management and governance.	Director of Mutual/Trust Operations		Ongoing

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Policy/Action Number	Text	Primary Responsible Party	Additional Parties Involved	Timeframe (Years)
Policy HMU-2.3	Collaborate with Mutuels 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 Mutuels 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 Mutuels to ensure continuity between GRF and adjoining Mutuels, while encouraging variety and interest throughout the valley.	Director of Mutual/Trust Operations		Ongoing
Policy HMU-2.6	Work with Mutuels 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 Mutuels 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 Mutuels 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	Work with the Mutuels, 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.	Director of Mutual/Trust Operations	General Counsel	1
Goal HMU-3: Thoughtful review of potential new housing development.				
Policy HMU-3.1	If additional new housing is desired within Rossmoor, work with the Mutuels 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
IMPLEMENTATION				
Goal IMP-1: A GRF that responds to current conditions and looks ahead to anticipate Rossmoor's future needs.				

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