General Plan Revisions
by the GRF Board of Directors

June 14, 2016
July 12, 2016
August 9, 2016
A. Background

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

♦ Homeowners and Mutuals are encouraged to retrofit homes to improve energy efficiency, including improvements to insulation, windows, and heating systems.

♦ The GRF provides an extensive recycling program that includes items such as cardboard, green waste, and appliances.

♦ Prescription pill and "sharps" disposal service, batteries, and hazardous waste collection are available to residents.

♦ Turf landscaping areas are being reduced where possible, deer- and drought-resistant plant materials are used whenever possible, out-
dated irrigation systems are updated. All irrigation controllers were replaced with Smart Controllers through an East Bay Municipal Utilities District (EBMUD) Rebate program that has resulted in 15 to 20 percent savings on water consumption by 2010.

♦ Mandated EBMUD water use reductions have been implemented on GRF land, golf course land and mutual-controled land. Significant landscape use and appearance change is evident here, as in the entire Bay Area, and throughout California, reflecting the many years of extreme drought.

♦ Rossmoor has identified heritage trees, and some Mutuals are currently inventorying other important existing trees.

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

B. Goals, Policies, and Actions

| Goal ENV-1 | Conservation of energy and non-renewable resources within Rossmoor. |

Policies

Policy ENV-1.1 Review programs and funding options on an on-going basis to find feasible approaches to energy, water and non-renewable conservation, and plus renewable energy.

Policy ENV-1.2 In new construction and remodels, meet State energy efficiency standards.

Policy ENV-1.3 New construction, remodels, and landscaping projects should minimize paved areas and use absorptive paving materials to minimize heat island effects and runoff, plus maximize irrigation and rainwater infiltration.
Policy ENV-1.4 Evaluate siting of new buildings to determine if active or passive solar heating and cooling opportunities exist, and, if so, whether to build them in initially or simply design new buildings to anticipate future potential alternative energy systems, such as solar panels.

Policy ENV-1.4 Policy ENV-1.5 Consider adopting Leadership in Energy and Environmental Design (LEED® www.leed.usgbc.org) standards for new construction, and take costs for certification under consideration.

Policy ENV-1.5 Policy ENV-1.6 Choose Rossmoor When purchasing fleet vehicles, consider that are the lowest-polluting and most energy-efficient vehicles available under the funding programs that support their purchase.

Policy ENV-1.6 Policy ENV-1.7 Publicize energy-saving ideas, including the ‘Hot Day Program,’ through all available community media, including the Rossmoor News, website, television and similar community-wide outreach.

Policy ENV-1.7 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, and Support other such initiatives as a way to enhance Rossmoor’s stewardship of our resources, Rossmoor’s place as a leader in energy conservation and environmental sustainability, as well as cost effective, community management.

Actions

Action ENV-1.1 Consider implementing the recommendations of Rossmoor energy alternative and sustainability organizations and committees on an on-going basis, as funds are available.
Action ENV-1.2 Incorporate energy, water and resource conservation into administrative policy to ensure that conservation is part of every employee’s job.

Action ENV-1.3 Establish energy-saving policies for GRF fleet vehicles, including reducing idling times, reviewing routes for efficiency, and utilizing all cost-effective, non-fossil fuel energy sources, when available.

Action ENV-1.4 Study retrofitting lighting to LED.

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

Policies

Policy ENV-2.1 Use low- or non-toxic building materials and integrated pest management in landscape maintenance, new buildings, and building remodels when feasible.

Policy ENV-2.2 Use organic or non-toxic housekeeping products at all GRF locations when feasible.

Policy ENV-2.3 Consider conversion to air drying machines after hand-washing in public bathrooms, instead of paper towels, reducing paper use and maintenance.

Goal ENV-3 Water conservation throughout the community.

Policies

Policy ENV-3.1 Seek to reduce water demand for landscaping, including implementing landscaping and irrigation standards and restrictions developed by the state, City of Walnut Creek and East Bay Municipal Utility District.

Policy ENV-3.2 Publicize and encourage water-saving ideas through all available Rossmoor media, including the Rossmoor News and similar community-wide outreach.
Actions

Action ENV-3.1 Explore additional opportunities for use or re-use of non-potable water for landscape irrigation and groundwater recharging.

Action ENV-3.2 Maintain and review vigilance on efficient irrigation use and water use reduction, using technology as well as visual monitoring.

Action ENV-3.3 Evaluate new advances in drip irrigation and other water saving practices and devices for retrofit and new landscape.

Action ENV-3.4 Consider separation of potable and non-potable water lines in remodel and new construction.

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

Goal ENV-4 Protection of biological resources in Rossmoor.

Policies

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

Actions

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

Action ENV-4.2 Continue to identify heritage trees located in Rossmoor and protect them per the Walnut Creek Tree Preservation Ordinance.
Action ENV-4.3 Review landscape chemicals for negative impact.

Action ENV-4.2 Action ENV-4.4 Minimize light pollution where feasible appropriate.

**Goal ENV-5** Balance between the enjoyment, the practicality, and the health issues of living with wildlife.

**Policies**

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

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

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

**Actions**

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

**Goal ENV-6** Reduced waste generation in Rossmoor through creative solutions to waste management.

**Policies**

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

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

Policy ENV-6.3 Expand recycling programs in GRF buildings, with a focus on educating residents and employees on its benefits, and
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.

Policy ENV-6.3 Policy ENV-6.4 Reduce green waste.

Actions

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

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

Action ENV-6.3 Evaluate opportunities to market green waste, not already reused onsite, to sell to outside vendors for tree chipping, composting or other uses.

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

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

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

Rossmoor’s open space covers over 700 acres within which the Trails Club maintains 4.5 miles of trails. **Correct number?** Adjacent public open space includes Las Trampas Regional Wilderness, with trail connections, and East Bay Municipal Utility District (EBMUD) property. Ecosystem types within the open space include riparian woodland, oak...
woodland, brushland, and grassland savanna. Wildlife includes 120 species of birds, deer, fox, mountain lion, coyotes, reptiles, amphibians, invertebrates, and insects.

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

B. Goals, Policies, and Actions

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<tr>
<th>Goal OSL-1</th>
<th>Preserved open space areas that buffer Rossmoor from surrounding development.</th>
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**Policies**

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

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

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<tr>
<th>Goal OSL-2</th>
<th>Preserved open space areas that provide opportunities for active and passive enjoyment.</th>
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**Policies**

Policy OSL-2.1 Enhance views of Rossmoor’s open space areas.
Policy OSL-2.2 Support the Trails Club’s efforts to provide a seamless connection to Rossmoor roads/ sidewalks, mapping, signage, appropriate expansion, and maintenance of trails within Rossmoor’s open space areas.

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

Goal OSL-3 Maintain open space areas.

Policies

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

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

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

Actions

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

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

Action OSL-3.3 Identify open space areas that could be developed if needed.
**Goal OSL-4**  Landscaping—Prioritize landscaping throughout Rossmoor that provides natural beauty, and is both durable and environmentally-friendly.

**Policies**

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

**Actions**

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

Action OSL-4.1 Use hydro zones to group plants with similar water needs.

Action OSL-4.2 Space plants at distances appropriate for mature size.

Action OSL-4.1 Action OSL-4.3 Plant trees for their shading, cooling and other effects and benefits.
A. Background

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

The Coupon consists of two portions: 1) the Mutual portion, and 2) the GRF portion. It is collected monthly by the Mutuals from each manor. GRF has three principal sources of operating cash: 1) the GRF portion of the Coupon, 2) payments for services provided by the Mutual Operations Division, and 3) fees and sales proceeds from residents, clubs, and non-residents for goods and services.

The Coupon charged by each of the Mutuals is used to a) fund the costs of operations of the Mutual, and b) pay the carrying charges which cover the costs of operation of GRF per the terms of the Trust Agreement. The Coupon is collected monthly by each Mutual from residents of each manor.
GRF has three principal sources of operating cash: 1) payment of carrying charges received by GRF from the Mutuals out of the Coupon payments collected by the Mutuals, 2) payments from the Mutuals for services provided directly to the Mutuals by the Mutual Operations Division of GRF, and 3) fees and sales proceeds from residents, clubs, and non-residents for goods and services provided by GRF.

Revenue for GRF's Trust Fund, comes primarily from membership transfer fees, $7,000 per manor as of 2010 which are reviewed periodically, and medical center rent. If the Trust Fund is used for capital projects/equipment. When additional capital funds are required, loans can be taken out and are repaid from the Trust Fund.

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

GRF functions similar to that of a small city, and manages not only 1800 acres of ground, communal facilities for almost 10,000 residents, and a substantial budget for same, maintaining for today, as well as planning and building for tomorrow.

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

B. Goals, Policies, and Actions

| Goal FIN-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. |
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.

Policies

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.

Policy FIN-1.3 Engage a qualified audit firm to conduct an annual audit using current recommended professional association guidelines.

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.

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.

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. Consider cost of maintenance and upgrades when evaluating cost of new facilities.
Policy FIN-1.76 Review the impact of ongoing operating costs for new facilities on GRF’s operating budget and Coupon charges when deciding whether to develop such facilities.

Policy FIN-1.8 Systematically maintain GRF buildings and facilities to prolong their useful lives so long as that remains cost-effective.

Policy FIN-1.9 Consider the costs and benefits of construction of new GRF facilities versus maintenance and upgrades for existing facilities.

Policy FIN-1.10 Enhance manor sales and associated Membership Transfer Fees and dedicate the fees to fund capital projects.

Policy FIN-1.11 Periodically review programs and services to ensure they are providing cost-effective, quality services and resulting in desired outcomes.

Policy FIN-1.427 Review GRF obligations to employee salary and benefit programs, as well as the impact of these programs on the GRF portion and MOD portions of the Coupon and on recruitment and retention of employees.

**Actions**

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.

Periodically analyze the direct cost of GRF services provided by staff to determine whether they are cost effective. This would include a comparison of the cost of outsourced services without sacrificing quality or other aspects of the services important to Rossmoor residents.
Goal FIN-2  An organizational culture that continually seeks entrepreneurial opportunities and expanded revenues consistent with the needs and expectations of Rossmoor residents.

Action FIN-1.2  Consider Mutual Operations Division finances when developing GRF Operations budget and allocations.

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

Action FIN-1.3  Consider establishing designated reserves as part of the trust and operations budgets to address future needs.

Consider establishing an operating reserve to address future needs and to help prevent significant fluctuations in future budgets.

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

Policies

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

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.
Policy FIN-2.32 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.

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.

**Actions**

Action FIN-2.1 Regularly Review ideas for revenue enhancement, including those presented in this Plan, to determine which should be implemented consistent with GRF policies.

Action FIN-2.2 Continue to improve marketing of Rossmoor to enhance manor sales and associated Membership Transfer Fee revenue.

Note to GRF Board: Action FIN-2.2 moved to Communications, Chapter 12, as new Action COM-1.6

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

**Policy**

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

**Actions**

Action FIN-3.1 Review Audit Committee charter for consistency with not for profit standards.
Action FIN-3.21 Engage a qualified audit firm to conduct an annual audit using generally accepted auditing standards.

Action FIN-3.32 Consider posting on Rossmoor website GRF and related entities’ monthly financial statements and Finance Committee agenda packages.

Action FIN-3.43.3 Consider posting link on Rossmoor website to public information filings, i.e., Department of Labor public filings for GRF employee Benefit Plans and quarterly pension plan interim financial statements with same financial information as filed with DOL. Department of Labor public filings for GRF employee Benefit Plans and quarterly pension plan interim financial statements with same financial information as filed with DOL.

Action FIN-3.5 Consider preparing quarterly pension plan interim financial statements with same financial information as filed with DOL.

Action FIN-3.56 Consider reporting budgeting activities and facilities by using cost accounting procedures.
A. Background

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

The GRF has three swimming pool facilities, generally open seven days a week, with family-swim open at Hillside Pool for at least two hours seven-six days a week. The Del Valle pool, extensively renovated in 2006-2007, is enclosed and provides lap facilities as well as a warm-water area. The Dollar and Hillside pool facilities were renovated in 2001-2002 and 2009 respectively, and 2012. The Hillside pool facilities were renovated in 2010.
The fitness center, under review for renovation, renovated in 2001, offers approximately 98,120 classes per week, cardiovascular equipment, weight machines, and fitness trainers working with individuals and groups.

Rossmoor's two golf courses, Creekside and Dollar Ranch, cover 150 acres and represent two different types of course. The Dollar Ranch course is 18 holes and spread out over a hilly area. The Creekside course is nine holes and more easily walkable than Dollar Ranch. Both courses are maintained regularly have been renovated per the 1997 Golf Course Master Plan with satellite-controlled sprinklers re-using water on-site. Some portions of the courses, including restroom facilities, remain unrenovated. There are four resident golf clubs organizations. The golf courses provide guest access during specific hours, host tournaments, and rent out golf carts make available golf carts and equipment.

There are five six clubhouses: Gateway, Dollar, Del Valle, Hillside, and Creekside and the Event Center. Venue reservations within clubhouses and other GRF locations are handled by GRF the Recreation Department. In the case of all clubhouses, demand is high for rooms with kitchen space. Creekside facilities include a social building with meeting rooms, a pro shop, and a restaurant kitchen/bar, a building for Rossmoor News, the TV channel, Cart Barn, and a public safety and maintenance building. In addition to these facilities, two more buildings are planned for the future: a new golf pro shop and an events center with a stage, and would include additional parking.

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

Rossmoor has 211 over 200 clubs which make use of various facilities. Clubs include movies, athletics, games, arts and crafts, social, intellectual, political, religious and special interests. Facilities usage is steadily increasing.
Rossmoor’s two libraries are located at Gateway Clubhouse and Dollar Clubhouse. The Gateway Clubhouse library Neither library has computerized files and the Dollar Clubhouse library uses an “honor system” for checking out books. The Gateway library has space constraints. GRF works with the Walnut Creek Library to provide residents with access to all its materials on a request and delivery basis.

Utility providers include East Bay Municipal Utility District (EBMUD) for water service, Pacific Gas & Electric (PG&E) for gas and electric service, Central Contra Costa Sanitary District for sewer, AT&T and Comcast for land line phone services, Allied Waste and Valley Waste Management Republic Services for waste removal, and Comcast for cable. Storm drains flow to Tice Creek and are provided maintained by GRF and/or the Mutuels. Sidewalks and streets are owned and maintained by the GRF while entries are owned and maintained by the and some Mutuels. Basic-Cable TV service isand broadband are included in the monthly GRF Coupon and limited wireless network access is provided by GRF in all clubhouses, except Dollar. Cell phone service is not under GRF jurisdiction, however GRF collaborates with cell-phone companies on placement of towers.

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

B. Goals, Policies, and Actions

| Goal FAC-1 | Modern facilities that meet the needs of Rossmoor residents. |
Policies

Policy FAC-1.1 Maintain and enhance all GRF clubhouse facilities and grounds as appropriate to the social, intellectual, cultural, spiritual, and recreational needs and desires of residents.

Policy FAC-1.2 Maintain and enhance the parks and golf courses for recreation and as landscaped open area focal points.

Policy FAC-1.3 Continually refer to a Create-a Facilities Master Plan when covering all major sites and considering usage, accessibility, storage, food service, etc. to 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.

Policy FAC-1.4 Consider adopting additional maintenance practices for Design new GRF facilities with reduced maintenance costs in mind which include including “green” concepts green building, infrastructure, and energy and water conserving conservation programs while ensuring high quality design.

Consider adopting additional maintenance practices for Design new GRF facilities with reduced maintenance costs in mind which include including “green” concepts green building, infrastructure, and energy and water conserving conservation programs while ensuring high quality design.

Policy FAC-1.5 Provide access and usage of GRF facilities/properties for active residents as well as those with disabilities all residents, regardless of disabilities, whenever economically feasible or legally required.

Policy FAC-1.6 Update interiors of GRF facilities on a routine basis to ensure high quality.

Policy FAC-1.7 Provide on-site food service at appropriate GRF facilities.
Policy FAC-1.8  Work with the Acalanes Union High School District to explore the use and/or purchase of the former Del Valle High School facilities.

Policy FAC-1.9  Review the status and priority of proposed major capital facilities projects annually.

Actions

Action FAC-1.1  Explore expanding commercial services consistent with Rossmoor's core values as expressed in the Mission Statement using GRF land and buildings that can be made available to meet residents' needs 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 and requests.

Action FAC-1.2  Complete the Creekside Master Plan. [Completed in December, 2013, with modifications]

Action FAC-1.3  Remodel the Del Valle Clubhouse to accommodate an expanded and enhanced Fitness Center, meeting spaces, and other facilities as needed, as recommended by the Residents' Task Force in 2014, and other studies.

Action FAC-1.4  Develop a permanent table tennis facility. [Completed in July, 2013]

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.

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 as needed.
Action FAC-1.7: Create and continue to develop a Facilities Master Plan and update annually, and use it as a planning tool for budgeting and project development.

Action FAC-1.8: Study the rehabilitation of the Hillside and Dollar Clubhouses, upgrade its kitchen and restrooms, make it handicapped accessible while preserving the building's architecture.

Action FAC-1.9: Consider upgrading the Gateway multi-purpose rooms, and arts and crafts rooms and other special-use rooms.

**Goal FAC-2**

A balance between the competing demands for facility use.

**Policies**

Policy FAC-2.1: Maintain and enforce rules and policies that allow for fair and orderly use of GRF facilities by Rossmoor residents and clubs.

Policy FAC-2.2: Permit renters, guests and other non-residents to use GRF facilities when appropriate and feasible, charging guest fees for use, where feasible, to ensure that they generate revenue for the community and that non-resident use does not negatively impact the availability or quality of facilities for residents.

Policy FAC-2.3: Where possible, specialized GRF facilities used by clubs should be managed by those clubs.

Policy FAC-2.4: Use coordinated current, efficient technology to obtain GRF facility access and usage data and to enable appointments and reservations for facilities and events.
Actions

Action FAC-2.1 Continue to develop a means by which residents’ needs and interests can be reviewed and considered. See 2010 Appendix I and 2015 comments.

Action FAC-2.2 Continue to develop Ensure that amenities and activities keep pace with demands.

Action FAC-2.3 Make available to residents a summary of the GRF Board’s review of future facilities projects.

Action FAC-2.4 Consider enlarging Creekside restaurant, kitchen and bar facilities.

Goal FAC-3 Utilities that provide adequate capacity to meet Rossmoor’s needs.

Policies

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

Actions

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

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

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

A. Background

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

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

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

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

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

B. Goals, Policies, and Actions

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

Policy TRA-1.1 Maintain Rossmoor’s existing private roadway network in good physical condition.

Policy TRA-1.2 Actively engages City, County and other government agencies, to maintain public ingress and egress routes as well as emergency access roads in good physical condition.
Policy TRA-1.3 Expand safety on Rossmoor’s roadways through the implementation of structural and non-structural measures such as encouraging driver training, providing safety information, and installing current traffic control techniques.

Policy TRA-1.4 Evaluate and expand available but unused transportation mobility options for Rossmoor residents, including options such as electric cars, bicycles, golf-carts, carpooling, car-sharing, shuttle services, and new transportation technologies.

Policy TRA-1.5 Encourage use of “smaller footprint” and energy efficient transportation through implementation of favorable enticements, such as close access parking. Prioritize “low hanging fruit” solutions for problem intersections that will provide immediate and low cost improvement. Prioritize “low hanging fruit” solutions for problem intersections that will provide immediate and low cost improvement.

Policy TRA-1.6 Enforce the California Vehicle Code and Walnut Creek Municipal Code on Rossmoor’s streets through the City of Walnut Creek.

Policy TRA-1.7 Evaluate outsourcing as an option to provide all or part of the transportation services.

Policy TRA-1.8 Prioritize Rossmoor’s overall use of “smaller footprint” and energy efficient options, if they cost equal or less, through implementation of favorable enticements such as close access parking of such vehicles. CHANGE ORDER TO 1.4 for logical flow?
Actions

Action TRA-1.1 Study existing intersections and entries to the roadway network to determine where Identify and improve roadways to operational improvements of intersections and entries, could that which enhance safety, including restriping lanes, stop signs, and other signage and mirrors to expand visibility. Prioritize “low hanging fruit” exercises for problem intersections that will provide immediate and low cost improvement to Rossmoor’s safe environment for drivers and pedestrians. (For example, speed notification signs on hilly sections of Golden Rain and Rossmoor Pkwy, and adding additional stop sign to Terra Granada/Rossmoor Parkway/ Tice intersection and clearing landscape creating visual impediments.

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. Completed WHEN?

Action TRA-1.3 Develop a program to continue to encourage safe driving on Rossmoor’s roads. This program should encourage drivers in Rossmoor to participate in driver education programs and to drive only if they are safe drivers.

Action TRA-1.4 Develop a program to improve traffic safety and reduce accident rates. 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. COMPLETED WHEN?
Action TRA-1.5 Study the provision of new or improved facilities, including dedicated golf car/bicycle lanes, for golf-car circulation either on or parallel to the Valley’s major streets.

Action TRA-1.6 Evaluate the need, feasibility and cost/benefit for electric vehicle charging stations at Rossmoor’s public facilities.

Action TRA-1.7 Assist mutuals in developing consistent policies and procedures to enable home charging systems for electric or hybrid vehicles to be installed by residents in carports or garages.

Action TRA-1.8 Continue to partner with Walnut Creek Police Department to maintain a visible, traffic enforcement presence.

Action TRA-1.9 Identify prioritize and implement “low hanging fruit” exercises to improve improvements at problem intersections that will provide immediate, relatively low cost improvement to Rossmoor’s safe environment for drivers and pedestrians.

Action TRA-1.10 Evaluate outsourcing as an option to provide all or part of the transportation services.

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

Policy TRA-2.1 Provide transportation within Rossmoor and that connects to key locations outside of Rossmoor such as BART, Downtown Walnut Creek, and shopping areas.

Policy TRA-2.2 Provide ‘Travel Training’ for first-time bus users and other outreach to familiarize residents with the bus system.

Actions

Action TRA-2.1 Engage an outside firm to regularly analyze the bus system in order to maximize its efficiency, cost-effectiveness, and usefulness to residents. (Last studied in 1995)

Action TRA-2.2 Evaluate outsourcing as an option to provide all or part of the transportation services. Publicize “New Transit Rider” training through all available media within Rossmoor to entice maximum ridership.

Action TRA-2.3 Consider tracking devices for GRF buses to enhance effectiveness.

Goal TRA-3 Appropriate transportation facilities for pedestrians, cyclists, and disabled persons.

Policies

Policy TRA-3.1 Provide and maintain sidewalks and pedestrian paths throughout Rossmoor focusing on pedestrian safety.

Policy TRA-3.2 All new construction or major building renovations shall meet ADA requirements and utilize ‘Universal Design’ and similar techniques to ensure access for persons with disabilities.
Actions

**Action TRA-3.1** Evaluate existing roadways and intersections to determine where they could be modified for pedestrian safety and comfort. 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.

**Action TRA-3.2** Evaluate connections between existing open space trails and residential areas, sidewalks, and community facilities.

Identify, prioritize and implement “low hanging fruit” exercises to improve problem pedestrian areas, to provide immediate, relatively low cost improvement to Rossmoor’s safe environment for drivers and pedestrians.

Continue to improve and maintain hiking trails, signage, trail grooming and sidewalk interface. Should this be in landscape or environment?
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9 SECURITY

A. Background

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

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

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

B. Goals, Policies, and Actions

Goal SEC-1 A safe and secure community.

Policies

Policy SEC-1.1 Balance 24-hour security with convenient access and privacy for residents.

Policy SEC-1.2 Strive to ensure that Rossmoor receives an adequate share of police and traffic safety patrols from the City of Walnut Creek.

Policy SEC-1.3 Use monitoring devices capable of storing images for later review and/or real time closed circuit monitoring to provide enhanced security as appropriate.

Policy SEC-1.4 Analyze data about security incidents on an on-going basis; then adjust Public Safety responses and crime prevention education based on the types of incidents that occur.
Actions

Action SEC-1.1 Study ways to upgrade entry gate security technology, including vehicle, delivery, bicycle, and walk-in traffic. During this process, review how service providers and guests are given access to the community and consider ways in which greater security could be provided without resulting in undue difficulty of access.

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

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

Goal SEC-2 An ability to respond to emergencies and disasters.

Policies

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

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

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

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

Policy SEC-2.5 Support emergency and disaster preparedness activities, including fire prevention education, earthquake preparedness, personal safety education, and other educational programs tailored to Rossmoor’s population.
Policy SEC-2.6 Assure continuity of critical GRF operations during power outages and emergencies.

Actions

Action SEC-2.1 Study emergency assistance access to allow GRF staff and emergency providers to enter resident manors in case of emergency.

Action SEC-2.2 Maintain and as necessary update GRF’s All Hazards Emergency Disaster and Preparedness Operations 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. The plan describes how GRF will work together with the City, various resident emergency response organizations, and Rossmoor residents in emergency situations.

Action SEC-2.3 Sponsor GRF Board of Directors and staff training and drills in Incident Command Structure (ICS) responsibilities.

Action SEC-2.4 Continue resource support for resident-driven disaster response organizations by providing training resources and procuring necessary equipment and supplies.

Action SEC-2.5 Include disaster response communication, training information, access to standard operating procedures and documentation on the existing Rossmoor website.

Action SEC-2.6 Establish an emergency communication system for the residents. Coordinate this communication with First Responders.
Action SEC-2.7 Assess status and anticipate needs to facilitate maintenance of critical GRF operations during emergencies and provide for the continuation of those operations.
A. Background

Supportive wellness services foster a vibrant, healthy, and active community. The programs offered afford resident’s opportunities to augment daily life with social, emotional, and physical support services through classes, counseling, clubs, and events. Support includes Stair-Trac service, welfare checks, paratransit, over 120 fitness, nutrition, and physical education classes, referral services for home health agencies as well as a list of Rossmoor residents who offer services for a fee, home safety improvements, and counseling services. Counseling services include in-home assessments, short-term counseling, support groups (such as grief counseling), Wisdom Circles, crisis intervention, financial counseling referring residents to sources of financial assistance, disbursement of grants, compan-
ion lists, a volunteer exchange program, educational programs, long-term care planning, the Rossmoor Women’s and Men’s Conferences, and a Health and Safety Fair, and an optimum wellness series.

B. Goals, Policies, and Actions

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

Policies

Policy WLN-1.1 Coordinate programs and services to facilitate residents in maintaining their health and independence, with special attention to residents who need some assistance to age in place.

Policy WLN-1.2 Provide referrals to service providers that can help residents remain in Rossmoor or transition successfully to other housing.

Policy WLN-1.2 Encourage the use of in-home caregivers who assist residents with staying in their homes.

Policy WLN-1.2 Support the fitness center and other recreational facilities, and services that promote an active healthy lifestyle.

Policy WLN-1.3 Support clubs/organizations and counseling services to respond to residents’ wellness issues, including social, intellectual, cultural, spiritual, and recreational needs and desires. Examples of activities include social gatherings, physical activities, peer support, and short-term financial-aid to needy residents.

Policy WLN-1.4 Continue using counseling services to provide referrals for services of financial assistance, short-term review of financial need for those undergoing financial hardship.
Actions

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.

Action WLN-1.2 Consider expanding the counseling services by adding more staff and interns, and enlarging the facilities. 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.

Action WLN-1.3 Facilitate resolution of communication issues among residents through the counseling services provided by GRF.

Note to GRF Board: Action WLN-1.3 was moved from Chapter 12, Communications (formerly Action COM-1.3)
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A. Background

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

Volunteers provide a variety of valuable services, including programs serving recreational centers and events, and weekly lunches. Counseling Services and Recreation coordinate volunteer activities.
Over 200 clubs and organizations at Rossmoor provide service, cultural, support, social, fitness, sports, arts and crafts, political, spiritual, and heritage activities. Clubs are supported by the community through the provision of meeting space and other facilities and lockers for storage. In general, clubs do not have dedicated meeting space, but some clubs are responsible for specialized spaces tailored to their needs.

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

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

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

B. Goals, Policies, and Actions

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

Policy SRP-1.1 Balance the provision of social, cultural, and recreational opportunities that serve active residents with opportunities for those who are physically challenged in their ability to participate.

Policy SRP-1.2 Support groups, clubs, and organizations undertaking social, cultural, and recreational activities, including active recreation such as sports, through provision of appropriate space and facilities and administration of insurance.

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

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

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

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

Actions

Action SRP-1.1 Continue providing an outdoor activity during the warm months on a cost-recovery basis, which should be focused on food, enjoyment, and be broadly desirable to all residents.

Action SRP-1.2 Consider expanding movie offerings, in terms of the variety of movies shown and the number of showings of popular features.
Action SRP-1.3  Continue to work with the Activities Council to assess current locker storage needs for clubs and organizations and assess an annual fee for locker use and assess an annual fee for locker use.

Action SRP-1.4  Consider purchasing a tour bus for use in Rossmoor-scheduled activities.

Action SRP-1.5  Encourage more involvement with community-based activities.

Goal SRP-2  Cultural and educational programs that provide opportunities for life-long enjoyment and learning.

Policies

Policy SRP-2.1  Work with local educational institutions and libraries to provide a wide range of educational options that are appropriate to Rossmoor’s population and available at convenient times and locations.

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

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. (Completed 2014)
A. Background

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

Rossmoor collaborates with the real estate industry to market through the Rossmoor News; and a brochure describing which describes Rossmoor
that is (modified for specific companies, as well as) and a promotional video. Rossmoor Ambassadors are current residents who reach out to potential residents.

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

The websites include a community website that is updated as needed, weekly and a documents website on which GRF documents are posted and (Mutual documents may be posted but are not required, and). Also a News website that is updated weekly and contains most a digital copy of the printed paper content Rossmoor News.

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

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

| 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. |

Policies

Policy COM-1.1 Maintain open, clear, and timely lines of communication that flow freely among residents, including GRF employees, and Board members, standing and ad hoc committees, the Mutuals, and local and State government. Internally, and other pertinent entities, communicate with residents via Rossmoor News, TV channel, Rossmoor websites, and GRF Board and committee meetings.

Policy COM-1.2 Approach communication in a spirit of openness and sharing, recognizing that the community exists for its residents and residents have a right to know what is going on and have an opportunity to participate provide input in decision making. A well informed community benefits everyone.

Actions

Action COM-1.1 Review and develop additional methods of communication among GRF, Mutuals and residents via e-mail, text messages, and social media. 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. Encourage Mutuals to be in contact with their residents by e-mail and whatever other means they deem
appropriate. 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. Enhance emergency preparedness information, e.g., a radio dispatch system, link to CERT on the Rossmoor News, TV channel, and website. Consider developing a radio dispatch system that can link to CERT information posted on the Rossmoor website to improve the dissemination of emergency preparedness information throughout Rossmoor.

Action COM-1.2 Update the Rossmoor websites continuously to ensure (home page and Rossmoor News) daily so that communication information is as effective as possible current. Assure that web postings of pdf documents are searchable. Give residents the option of receiving the Rossmoor News online or by home delivery. Be more creative with Channel 28 programming to enhance viewership, for example, interview residents, air the video once a month. Explore giving residents the option of receiving the Rossmoor News online or by home delivery. The Golden Rain Foundation should obtain email addresses from Rossmoor residents in order to make online home delivery of the News possible for those residents who would like it.

Action COM-1.2 Enhance Action COM-1.3 Encourage 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. Alternate Board meetings to an afternoon and evening schedule. Post the Continue posting Board and committees’ agenda packages online at least four days prior to meeting and draft minutes four days after.
Action COM-1.4 Enhance the 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 promote the sale of promoting it as “a retirement community of active senior adults.”

Action COM-1.5 Consider appointing and training residents to serve as tour guides for people interested in buying a residential unit.

Action COM-1.3 Facilitate resolution of communication issues among residents through the counseling services provided by GRF.

Note to GRF Board: Action COM-1.3 was moved to Chapter 10, Wellness.

Action COM-1.6 Continue to improve marketing of Rossmoor to enhance manor sales and associated Membership Transfer Fee revenue.

Note to GRF Board: Action COM-1.6 was formerly Action FIN-2.2 in Chapter 6, Finance.
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A. Background

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

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

**Policies**

Policy TEC-1.1 Use **appropriate, integrated current** technology that **enhances the lives of residents and to improves the convenience and efficiency and convenience** in providing services and running facilities at Rossmoor **in the provision of GRF services and facilities.**

**Actions**

Action TEC-1.1 Establish a continuing relationship with a technology consulting firm **to augment staff capacity and skillsets.**

Provide resources to keep current with best practices and technology, and systems management.

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

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

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

Action TEC-1.5 Conduct a study to determine the feasibility of utilizing **Establish a comprehensive, secure, reliable, and failure-safe scalable 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.

Action TEC-1.6 Consider Conduct a study to determine the feasibility of installing a secure wireless network that covers all GRF properties of Rossmoor.

Action TEC-1.7 In addition to the above Consider establishing Establish a standing, qualified resident technology committee to advise the GRF Board on innovative IT issues.

**Goal TEC-2** A collaborative approach to IT systems and technical solutions to enable better coordination among GRF departments and MOD operations.

**Policies**

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

**Actions**

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

Action TEC-2.9 Seek opportunities to use a common database to enable better data sharing among users with secure and appropriate access rights.

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

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

Rossmoor’s internal governance is divided between the GRF and the 1817 Mutuals (homeowners’ associations or common interest developments—individually), which comprise Rossmoor-Walnut Creek. The Mutuals are individually, and independently responsible for
maintenance and management of the 6,678 Manors and the common properties they occupy. The GRF acts as the Trustee of the properties and facilities common to all of the 1817 Mutuals (homeowners’ associations or common interest developments) which comprise Rossmoor-Walnut Creek, and is the corporate entity which provides services and programs to all of the communities’ residents. Underpinning the governance structure is the 1964 Trust Agreement which, unless extended, will expire in 2032. To the degree that the GRF is subject to the Davis-Stirling laws relative to common interest developments, the GRF Board has resolved that the GRF is a community service organization and subject to the provisions of the Davis-Stirling Act relating to that type of entity.

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

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

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

<table>
<thead>
<tr>
<th>Goal GOV-1</th>
<th>Transparent, representative governance that is responsive to the needs of the Mutuals and Rossmoor residents.</th>
</tr>
</thead>
</table>

Policies

Policy GOV-1.1 Maintain and revise, as required, GRF’s bylaws, policies, procedures, and rules so that they continue to respond to the needs of Rossmoor residents.

Policy GOV-1.2 Continue to use a Trust Agreement and supporting policies or alternative governing method as a vehicle for cooperative and interdependent GRF and Mutual governance.

Policy GOV-1.3 Continue to openly gather resident input on large projects before making decisions.

Policy GOV-1.4 Safeguard financial and operational performances with appropriate audit and review processes.

Actions

Action GOV-1.1 Maintain and enhance 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. (completed 2011)

Action GOV-1.2 Establish a procedure for revising the Trust Agreement and alternative governing method, well in advance of expiration on April 19th, 2034. 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:
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.

The Trust Agreement Review and Revision Committee worked in May, 2015 without resolution of a new/revised Trust Agreement.

Action GOV-1.3 Improve the publicity about the GRF absentee voting options for residents who are not present during a GRF voting period.

Action GOV-1.4 Continue to use resident audit and finance committees to examine financial performance and internal controls.

Action GOV-1.5 Continue establishing a review cycle for key operational processes to ensure GRF operations and resident services are relevant, efficient, and cost effective.

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

Policies

Policy GOV-2.1 Ensure that residents have appropriate opportunities to provide input and 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.
Policy GOV-2.2 Encourage residents to participate in Ad Hoc and Resident Advisory Committees and CEO Advisory Groups, particularly when they have interests or expertise relevant to the topic being addressed.

**Actions**

Action GOV-2.1 Study whether to create a formal grievance procedure for residents with concerns related to GRF functions.

Action GOV-2.2 Expand the training and orientation program for GRF Board members and others in GRF leadership positions. *(completed 2011)*

Action GOV-2.3 Consider use of new technology and alternative formats for GRF meetings with the objective to increase resident participation.
A. Background

Housing in Rossmoor is provided by the Mutuals. All Rossmoor manor owners are members of a Mutual, which gives them standing with other Mutual groups and the GRF. Sales of individual manors to non GRF members contribute to the Trust Fund through the Membership Transfer Fee, so that Mutuals and GRF have a joint interest in encouraging manor sales.
Rossmoor’s residential areas consist of 47 Mutuals, which interact with GRF primarily through the Mutual Operations Division (MOD) of GRF. Mutuals can choose whether to employ MOD to provide property management and related services and the level of service for which they are willing to pay. They can also choose to use other service providers.

Rossmoor’s housing is comprised of:
- 3,654 co-ops
- 2,661 condominiums
- 300 Waterford units (a type of congregate living condominium unit)
- 63 single-family homes

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

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

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

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

B. Goals, Policies, and Actions

| Goal HMU-1 | A productive working relationship between GRF and all Mutuals in Rossmoor. |

Policies

Policy HMU-1.1 Recognize and respect the independence of the Mutuals in their role within the community.

Policy HMU-1.2 Provide maintenance, financial, and other services to Mutuals that choose to purchase them through the GRF Mutual Operations Division.

Policy HMU-1.3 Collaborate with Mutuals on purchase of insurance and other operational items where joint action saves money for both GRF and Mutuals.

Policy HMU-1.4 Review policies and procedures related to Mutuals to seek common agreement on any that may jointly affect the Mutuals and GRF.

Policy HMU-1.5 Provide counseling and other services in the community to assist Mutuals with resolving personal and interpersonal issues that affect residents.

Policy HMU-1.6 Encourage Mutuals to publicize the cost of water to their residents, and encourage their residents to conserve water.
<table>
<thead>
<tr>
<th>Goal HMU-2</th>
<th>Homes that are well-maintained, safe, and retain their value.</th>
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</table>

Policies

Policy HMU-2.1 Collaborate with Mutuals in areas where there is efficiency in combined outreach to residents (information through Rossmoor News and the TV channel), operations (MOD, handyman program), or other community-wide efforts (bulk insurance).

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

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

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

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

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

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

Policy HMU-2.8 Work with the Mutuals to identify structures that may need earthquake retrofits, and devise an approach to undertake those retrofits in a systematic way.
Policy HMU-2.9 Work with the Mutuals, especially those containing co-ops, to enable residents with financial needs to devise mechanisms whereby those residents may access equity via reverse mortgages or other financial instruments.

| Goal HMU-3 | Thoughtful review of potential new housing development. |

**Policies**

Policy HMU-3.1 If additional new housing is desired within Rossmoor, work with the Mutuals and the City of Walnut Creek to study this possibility.

Policy HMU-3.2 If additional new housing is studied, consider impacts on the environment, services, facilities, and other important aspects of the Rossmoor community.
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APPENDIX H

Task Force Suggestions To Consider In Developing An Overall Master Plan For GRF Facilities
APPENDIX H
TASK FORCE SUGGESTIONS TO CONSIDER IN DEVELOPING AN OVERALL MASTER PLAN FOR GRF FACILITIES

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

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

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

Creekside
1. Continue to review Complete the Master Plan for Creekside as adopted by the GRF Board and approved by Walnut Creek to meet the changing needs of the community
   a. Build planned Events Center to add 18,200 sq ft building for cultural, educational and social events.
   b. Build planned Pro Shop to add 1,730 sq ft
   c. Build new parking lot on the south of Stanley Dollar Drive.
2. Determine future of outdoor tennis and pickle ball courts: Update including perimeter fencing, surfacing, etc.
3. Determine golf practice areas in relation to all of the above
   2. Consider reconfiguring the overall facility to provide for expanded restaurant, bar and kitchen facilities

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

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

MOD
1. Update buildings and grounds as needed.
2. Expand parking
Garden and RV Areas where individual residents have exclusive use of land
1. Update \textbf{Maintain} miscellaneous facilities such as lots, buildings, infrastructure, etc.

\textbf{Golf Course}
1. Update restrooms
2. Repair golf cart \textit{bridges} crossing
3. Install water well
4. Continue to transition \textbf{Transition} to drought tolerant landscaping
5. See also Creekside #3

\textbf{Buckeye and Tee House}
1. Master Plan area for tennis, golf and parking (\textbf{Completed})

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

Ideas Offered By Individual Residents
Dear Don and members of the General Plan Review Task Force:

I recommend that GRF should develop an organization structure as shown by the chart above.

A. **Technology Committee and CTO**

**Background**

Presently, GRF mainly relies on the staff employees to make technological decisions. However, those staff members often lack knowledge about the current trends in the fast changing fields of technology; they always have tight work schedules and could conduct neither a comprehensive survey about the technological needs of the residents nor carry on a thorough research on a particular technology; and furthermore they often have their own preferences and interests in selecting any technology.
When hiring outside consultants, staffs also play a major role. Their tasks range from selecting candidates, communicating with the hired consultants, evaluating their suggested solutions and executing the suggestions in actual project. Sometimes unqualified consultants were brought in. In other situations, consultants’ suggestions were distorted, dismembered or just ignored due to staff’s restricted viewpoint.

I therefore propose the creation of a Technology Committee to bridge this gap. Its members should have solid professional background, in-depth technical expertise and abundant time to study particular technological issues, or organize such studies. Thus this committee will be able to provide sound recommendations for the Board to make decisions.

**Tasks of the Technology Committee**

Currently, the committee could focus on three major areas:

- **Information Technology.** Make a coherent and feasible plan to make Rossmoor catch up with industry trends, provide better service and meet residents’ demands for cutting edge technologies.
- **Building and construction.** Construction is the biggest expense in our budget. Event Center and Buckeye Tennis revealed the backwardness on both concepts and methodology. The committee should ensure industry procedure is followed and monitor the project management.
- **Green Technology.** Explore and make plan on renewable energy, water conservation, green building, green transportation, waste management, and other environmental and ecological issues.

**Chief Technology Officer (CTO)**

Separate project management function from the existing Resident Service Director’s role, promoting and expanding it to a new CTO position. The new CTO should have relevant training/education, expertise and experience in projects management, and perception on technical feasibility.

**B. Community Committee**

**Background**

When the Event Center controversy erupted, a grass root group Save Our Stanley, SOS, grew from two ladies to 3500 signatures. The GRF Board at that time basically had no communication with SOS except engaging in the conflicting arguments at GRF meetings. CEO Warren Salmons wrote a series of articles in Rossmoor News, but still couldn’t stop the widespread rumors. GRF had no idea about who were SOS and what were the major concerns behind the petition. It was a big lesson to learn for the whole community.

Currently, the communication channels between residents and GRF were limited to three-minutes speech at meetings, 250 words Rossmoor News letters, and colored T-shirt demonstrations.

Hence, an established Community Committee is needed. The committee members should be selected from residents with a variety of professional backgrounds, such as former social workers, social scientists, psychologists, and other professionals.
APPENDIX I
IDEAS OFFERED BY INDIVIDUAL RESIDENTS

Tasks of the Community Committee

The committee could focus on:

- Bridging the gap between GRF, administration staffs and residents;
- Understanding the sociological and psychological characteristic of a senior community. Developing guidelines for elected GRF/Mutual officers and staffs on how to handle issues with residents;
- Seeking outside resources by bringing in gerontology programs and research funds from academic institutes and government agencies;
- Conducting a major study on how to provide sufficient communications among residents, GRF and staffs through varies measures, from traditional face-to-face contacts to state-of-the-art technologies.

I suggest that the new CTO position should be equivalent in status to the current CFO position. The Technology Committee and the Community Committee should be parallel to the Finance Committee. The Community Committee is directly under CEO. These three committees and the three CxOs will become the first tier supporting for GRF decision making, and all other committees will form the second supporting tier.

Sincerely,

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