

RLC Commentary

Our Vision for Rossmoor Walnut Creek

Resident Engagement

A high percentage of Rossmoor's residents have chosen to get involved in making our community a great place to live. Residents welcome the opportunity to serve in leadership and support roles, including on club boards, mutual boards, the RWC (Formerly GRF) Board, and numerous committees (both standing and special-purpose). The RWC Board takes pride in the way it has activated and organized the diverse skills, experience and energy of the many residents who want to contribute to making Rossmoor continuously better. Everyone agrees that at Rossmoor

- There are abundant channels for being heard
- Concerns are listened to with an open mind, and
- Requests and proposals (from whatever source) receive prompt and effective responses

Customer Expectations Fulfillment

Rossmoor's leadership and support staff put outstanding customer experience at the center of their strategy and decision making. Everyone demonstrates, through their words and actions, their understanding that at Rossmoor the customer is our residents and our mutuals. Extensive use of feedback tools (including meetings, surveys, advisory groups, and independent assessments) have made a dramatic difference in the organization's sensitivity and ability to improve the Rossmoor life experience. Benchmarking surveys conducted by outsiders confirm what Rossmoor's internal surveys suggest—that Rossmoor Walnut Creek ranks at the top among all California active adult communities in terms of organizational flexibility, responsiveness to customer needs, and perceived overall quality of life.

Rossmoor Facilities

The quality, diversity and upkeep of Rossmoor's facilities is exceptional. This is achieved while also carefully controlling the coupon impact attributable to facility maintenance, renewal and replacement. Benchmarking comparisons with other top active-adult communities are regularly used to confirm both the excellence of the quality of our facilities and the reasonableness of our total facilities' costs.

Rossmoor Clubs

Rossmoor clubs are continuing to flourish and are consistently mentioned in resident surveys as one of the best aspects of the Rossmoor life experience. The clubs have reported much-improved relations with RWC Management and reduced administrative issues since the RWC Board implemented full compliance with Policy 304.2. [That policy clarifies that the creation and amendment of rules pertaining to residents' use of community facilities should be drafted by the users of those facilities to the maximum extent possible.] After discussion, the Board concluded that this policy (approved in 2010) should be reaffirmed, and that it should be applied to all community facilities, including to meeting rooms.

RWC Support Staff

Everyone in a support role on the RWC staff places “going the extra mile” when responding to customer needs at the top of their priorities. Factors that led to the creation of this culture included

- RWC Management emphasis
- A feedback system from users that tracks successful requests completion and other satisfaction metrics
- A peer-to-peer recognition program that reinforces and rewards outstanding customer service

RWC Management

RWC Management (the paid management) takes pride in its performance management tracking system. This system has contributed to improved accountability and faster delivery of quality work in the areas most important to Rossmoor customers. The metrics used in this system stimulates performance improvement ideas and provide a sound basis for employee recognition and rewards.

The managers regularly bring to Rossmoor new, but proven, technology to reduce costs. One recent example is the successful automation of the room scheduling system, which has greatly simplified that process and substantially reduced the required labor.

While the General Manager conveys his/her perspective to the Board on observed patterns and needs within the community, the Board relies on its own independent assessment of those patterns and needs, e.g., surveys, system metrics, and benchmarking studies, as their primary source of this information.

The General Manager’s annual performance review is based on system performance metrics that give major weight to resident and mutual satisfaction with the staff functions, individual managers, and (especially) the General Manager. This is part of the 360-degree review process.

Mutuals

The mutuals are key partners in the success of life in Rossmoor and are likely to be the closest relationship in representation and governance for the greatest number of residents. Each mutual has its own board of directors that operate separately from the RWC Board. The mutuals have a close working relationship with their property management company (The Mutual Operations Department) with key performance indicators that are reviewed annually and modified, if necessary, to ensure provision of excellent service. Mutuals operate based on their own priorities and are encouraged to plan major projects in collaboration with other mutuals to achieve cost efficiency and effectiveness.

RWC Board

All RWC Board members have established a high level of trust and connection with their customers. This is achieved and sustained through both responsive decision making and multiple forms of listening. The listening methods include

- Weekly, each board member chatting informally (1-to-1) with five customers with whom they have never checked in previously
- Expanding use of focus/project groups (e.g., Marketing Task Force) that include customer, Board, and management participants
- Frequent use of customer surveys to provide quantitative perspective on emerging issues and to identify target areas for continuous improvement
- A 360-degree performance feedback system that is used for Board members and all senior RWC managers

The RWC Board views its top responsibility as providing leadership for the Rossmoor community. This begins with a clear and motivating vision for Rossmoor that the Board is committed to and that the residents, mutuals, and management participated in creating. The vision is aspirational but also realistically achievable. It includes the idea of continuous improvement. The vision represents a desired future state that everyone at Rossmoor wants, everyone talks about, and that everyone is willing to work to create.

The Board is also involved in annual goal setting, budgeting, policy creation & stewardship, and risk management activities, but all of that is done within the context of pursuit of the Rossmoor vision.

An important input to the Rossmoor vision is the Board staying connected to what other active adult communities are doing, how they are structured, the communication systems they use, their cost competitiveness relative to Rossmoor, the technology they employ, etc. The Board is making regular use of external benchmarking studies as one way to keep well-informed. In addition, each Board member makes one trip per year to meet in person with a board member of another large active adult community and to tour that community.

The RWC Board routinely grants “Rossmoor recognized” status to grassroots resident groups who are seeking improvements to the community’s structure and systems (including feedback and accountability systems). While this is not intended to be a primary source of improvement, Rossmoor has a history of recognizing this type of group. A recent example is the Rossmoor Life Council, which has been recognized as a Rossmoor organization and which the Board often collaborates with on the design and implementation of resident surveys.

In Board discussions and Board voting, all Board members practice “straight talk.” In other words, members speak openly and honestly to express their views about options (while avoiding judgmental statements about individuals). Board votes are only unanimous if/when every member reaches the same conclusion, but never because some members believe differences in conclusions should not be disclosed when the Board votes.