



GRF MEDIA & COMMUNICATIONS MEETING OF THE GOLDEN RAIN FOUNDATION

Monday, October 21, 2019 - 1:30 PM
Laguna Woods Village Community Center Board Room 24351 El Toro Road

NOTICE OF MEETING AND AGENDA

- 1. Call to Order**
- 2. Acknowledgement of Media**
- 3. Approval of the Agenda**
- 4. Approval of Meeting Report - Monday, September 16, 2019**
- 5. Chair's Remarks**
- 6. Member Comments (Items Not on the Agenda)**
- 7. Director's and Staff Forum**

CONSENT: - *All matters listed under the Consent Calendar are considered routine and will be enacted by the Committee by one motion. In the event that an item is removed from the Consent Calendar by the Chair of the Committee, such item(s) shall be the subject of further discussion and action by the Committee.*

REPORTS:

- 8. Broadband & Contracts Report-Chuck Holland**
- 9. Marketing and Communications Report-Eileen Paulin**
- 10. Docent Tour Update-Becky Jackson**
- 11. New Resident Tour Update-Becky Jackson**

ITEMS FOR DISCUSSION AND CONSIDERATION:

- 12. Mutual Communication Committee Updates**

ITEMS FOR FUTURE AGENDAS:

CONCLUDING BUSINESS:

13. Committee Member Comments

14. Date of Next Meeting-Monday, November 18, 2019 at 1:30 p.m.

15. Adjournment



OPEN MEETING
THE GOLDEN RAIN FOUNDATION
MEDIA AND COMMUNICATIONS COMMITTEE
Monday, September 16, 2019, at 1:30 p.m.
Laguna Woods Village Community Center, Board Room
24351 El Toro Road, Laguna Woods, CA 92637

REPORT

MEMBERS PRESENT: Chair Joan Milliman, Directors Annie McCary, Pat English, Annette Sabol Soule, Maggie Blackwell, Lynn Jarrett, Juanita Skillman, Ryna Rothberg, Advisers Steve Carman, Sheila Bialka and Lucy Parker

MEMBERS ABSENT: None.

OTHERS PRESENT: Richard Rader - VMS

STAFF PRESENT: Eileen Paulin, Chuck Holland, and Becky Jackson

1. **Call to Order**
Chair Joan Milliman called the meeting to order at 1:31 p.m.
2. **Acknowledgement of Media**
Paul Ortiz from Village Television was present.
3. **Approval of the Agenda**
Agenda was approved with changing the reporting of agenda item number 9 before 8.
4. **Approval of Meeting Report from August 19, 2019**
Report was approved.
5. **Chair's Remarks**
Chair Milliman welcomed everyone.
6. **Member Comments (Items not on the Agenda)**
David Kohn 367-N was called to speak asked about Country Classics being on different channels and it being moved around. Consider adding one or two more new channels: News Max and One American News Channel.
7. **Director's and Staff Forum**
Chuck Holland explained Mr. Kohn's troubles are due to not having a set top box. Mr. Holland explained that the only way to solve the issue is to have a digital device.

In regards to the news channel he will get Mr. Kohn's information he will do the leg work

to see if he is able to get the channels. One America News Network and News Max.

REPORTS:

8. Broadband and Contracts Report - Chuck Holland

Mr. Holland gave a report on DwellingLive and the amount of calls that Resident Services are receiving. He reported that Fox Sports channel went off for four hours on Sunday and there was only one phone call received. He stated that the annual collection policy will be sent out in the annual mailer in November 2019.

Mr. Holland explained that the contracts with West Coast Internet are on hold until he is able to explore other broadband groups per the direction of GRF. He is currently working with an outside contractor to inventory what we have to determine what would be the best outcome for the Village.

Mr. Holland gave his regular report on Contract Renewals, Subscriber Counts, and Summary of Operations. Summary of Operations include: revenues, broadband services, employee compensation, materials and supplies, utilities, legal fees, outside services, repairs and maintenance, property and sales tax, cable programming, copyright, franchise, and uncollectible accounts.

9. Marketing and Communications Report - Eileen Paulin

Eileen Paulin reported on Marketing and Communications Report which included giving the committee an update of the new responsibilities taken by the MarComm Department.

Staff was directed to provide reports on New Resident Orientation and Docent Tours as to cost and see if they can be conducted less frequently.

Eileen Paulin reported on the phone books and stated that they are not in compliance and there is also a competitive phone book.

Ms Paulin will work with Tim Moy, Chair Milliman, Mr. Holland and Director Annette Soule to reach out to Farmer's Publication about updating them on the policy.

Ms. Paulin introduced the Power Point Presentation that she presented before VMS board. Which included improvements in communications through various platforms:

- What's Up in the Village
- Village Breeze
- Newsletters, calendars and event promotions
- Flyers, calendars and posters

Electronic Communications:

- Increased subscribers to more than three-quarters of residents.
- Stellar further customized to be able to quickly target and deploy emails to residents affected by unscheduled elevator or power outages, facility closures, etc.
- Regular posting of Village news and club events to the website; also generating current chyron (crawl) messaging on TV6.

Goals of improving the website:

- Searchability
- Platform change
- Resident information behind portal
- Village-wide training sessions

Collaboration with Village Television:

- Coordinating programming to assure concise, consistent messages to residents
- Preplanning all staff and board member presentations to assure messaging consistency

The new platform for the Village Breeze

- All the information you need to live in the Village delivered to your mailbox – six times a year
- Bi-monthly 64-page magazine
- Four-color, coated cover
- Recreation events and classes
- Pool and Fitness Center schedules
- Community Map (pull out)
- Transportation information
- Alterations, Landscape, Maintenance, Security, Social Services, Resident Services updates
- Important Village phone numbers
- Information from VMS staff and board directors
- Helpful articles

ITEMS FOR DISCUSSION AND CONSIDERATION:

ITEMS FOR FUTURE AGENDAS:

Report on the Phone book

CONCLUDING BUSINESS:

10. Committee Member Comments

Adviser Sheila Bialka hopes to get the phone book situation straightened out.

Adviser Lucy Parker commented it was a good meeting and would like to have the Breeze six times a year.

Adviser Steve Carmen commented it was an excellent meeting and addressed Mr. Holland to have the streaming options with the removal of Fox. It would be good to communicate the suggestions on how to stream these through You Tube.

Director Ryna Rothberg commented it was an interesting meeting and hopes to work something out with Farmers Publications.

Director Juanita Skillman stated looking at what we are doing in these meetings is interesting.

Director Maggie Blackwell thanked everyone for a good meeting.

Director Soule stated she is glad to be on the committee and thanked staff for all the hard work they do.

Director Pat English thanked Chair Milliman for a very good meeting. She would like to put the telephone books to rest.

Director Lynn Jarrett commented on CEO Jeff Parker coming out to the Garden Villa meeting to talk about technology.

Director Annie McCary stated it was a good meeting.

Mr. Holland stated it has been interesting to present numbers with things changing.

Chair Milliman thanked everyone and finds herself becoming an expert on streaming.

11. Date of Next Meeting - Monday, October 21, 2019, 1:30 p.m. in the Board Room

12. Adjournment

Meeting was adjourned at 3:24 p.m.



Joan Milliman, Chair
Media and Communications Committee

STAFF REPORT

DATE: October 21, 2019
FOR: Media & Communication Committee
SUBJECT: Broadband Services Update

RECOMMENDATION

Receive and file report.

BACKGROUND

Regular monthly reports are submitted to the Media & Communications Committee (MACC) for review. Included in this Staff Report are the Contract Renewals, Subscriber Counts, Proforma Operating Statements.

DISCUSSION

The Broadband Services Division, including TV Operations, TV Studio, Media Services, High-Speed Internet, and Digital Services, are part of the Information Technology Department. Chuck Holland, Chief Information Officer, will be providing Broadband Services updates on an ongoing basis.

1. Contract Renewals
2. Subscriber Counts
3. Proforma Operating Statements

Prepared By: Paul Ortiz, Village Television Manager

Reviewed By: Chuck Holland, Information Services Director

ATTACHMENT(S)

- (i) Contract Renewals
- (ii) Subscriber Counts
- (iii) Preforma Operating Statement

2019 Contract Renewals

Channel	Parent Company	Expiration Date	Estimated Increase	Negotiations
TVG2 Horse Racing TV	Betfair Group Network	3/31/2019	0%	NCTC
CSPAN	C-SPAN Networks	3/31/2019	5%	NCTC
C-SPAN 2	C-SPAN Networks	3/31/2019	0%	NCTC
C-SPAN 3	C-SPAN Networks	3/31/2019	0%	NCTC
Display Systems CH. 3 Guide	Display Systems International	5/6/2019	5%	Independent
BET	Viacom	9/30/2019	10%	NCTC
Comedy Central	Viacom	9/30/2019	10%	NCTC
A & E	A&E Television Networks	12/31/2019	10%	NCTC
Crime & Investigation	A&E Television Networks	12/31/2019	0%	NCTC
FYI	A&E Television Networks	12/31/2019	0%	NCTC
Viceland	A&E Television Networks	12/31/2019	10%	NCTC
History	A&E Television Networks	12/31/2019	10%	NCTC
Lifetime	A&E Television Networks	12/31/2019	10%	NCTC
Lifetime Movie Network	A&E Television Networks	12/31/2019	10%	NCTC
Military History Channel	A&E Television Networks	12/31/2019	0%	NCTC
Fox Business News	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
Fox College Sports	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
Fox News Channel	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
Fox Sports 1	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
Fox Sports Net – Prime Ticket	Fox Cable Network Services LLC	12/31/2019	25%	Independent
Fox Sports Net West	Fox Cable Network Services LLC	12/31/2019	25%	Independent
FX	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
FX Movie	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
FXX	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
KCOP My 13	Fox Cable Network Services LLC	12/31/2019	15%	NCTC
KTTV Fox	Fox Cable Network Services LLC	12/31/2019	20%	NCTC
Nat Geo Wild	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
National Geographic	Fox Cable Network Services LLC	12/31/2019	10%	NCTC
WGN America	Tower Distribution Co.	12/31/2019	5%	Independent
The Cowboy Channel	Family Network	12/31/2019	0%	NCTC

2019 Subscriber Counts

	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG
Subscriber Counts							
Digital Subscribers	6,634	6,657	6,627	6,622	6,692	6,726	6,773
Set-Top Boxes							
DVR's	6,076	6,060	6,017	5,616	5,889	5,829	5,832
Standard	711	697	687	674	653	642	624
HD Standard	2,068	2,068	2,069	2,086	2,069	2,067	2,052
TiVo MG2	191	218	228	277	299	336	360
TiVo Qi3	194	224	236	277	298	346	369
DTA	380	371	370	368	363	363	363
HD Converter's	764	796	828	843	882	941	1,028
Pay-TV							
HBO	914	912	940	932	920	915	913
Cinemax	124	124	122	118	119	117	116
Showtime	448	450	441	437	441	436	437
Starz/Encore	306	301	297	292	291	289	289
PBC	18	18	18	18	18	17	18
International Ch.							
TV Asia	2	2	2	2	2	2	2
CTI-Zhong Tian	14	14	13	14	14	15	15
The Filipino Channel	46	46	43	43	42	44	43
CCTV4	10	10	9	9	9	10	9
Channel One Russia	12	12	12	12	12	12	12
tvK	10	10	10	9	10	11	11
TV5Monde	27	27	26	26	27	27	26
RAI Italia	9	8	7	7	8	8	8
TV Japan	50	49	49	48	50	51	51
Total International	180	178	171	170	174	180	177
High Speed Data							
High Speed Data	9,934	9,934	9,944	9,966	9,899	9,920	9,950

**Golden Rain Foundation of Laguna Woods
Proforma Broadband Services Summary of Operations
9/30/2019**

	<u>Cable Television</u>	<u>TV6</u>	<u>Ad Insertion</u>	<u>Internet</u>	<u>YTD ACTUAL</u>	<u>YTD BUDGET</u>
Revenues:						
Non-Assessment Revenues:						
Merchandise Sales						
41503500 - Merchandise Sales - Broadband	\$22,956	\$0	\$0	\$0	\$22,956	\$18,747
Total Merchandise Sales	22,956	0	0	0	22,956	18,747
Clubhouse Rentals and Event Fees						
42502500 - Clubhouse Event Fees - Non Residents	680	0	0	0	680	0
Total Clubhouse Rentals and Event Fees	680	0	0	0	680	0
Broadband Services						
45001000 - Ad Insertion	0	0	479,256	0	479,256	487,494
45001500 - Premium Channel	278,230	0	0	0	278,230	374,994
45002000 - Cable Service Call	88,828	0	0	0	88,828	112,500
45002500 - Cable Commission	69,919	0	0	0	69,919	37,494
45003000 - High Speed Internet	0	0	0	1,194,108	1,194,108	1,199,997
45003500 - Equipment Rental	1,350,922	0	0	12,600	1,363,522	1,290,744
45004000 - Video Production	0	32,030	0	0	32,030	41,247
45004500 - Video Re-Production	0	2,064	0	0	2,064	1,872
45005000 - Message Board	0	15,400	0	0	15,400	14,247
45005500 - Advertising	0	37,495	0	0	37,495	31,869
Total Broadband Services	1,787,899	86,989	479,256	1,206,708	3,560,853	3,592,458
Miscellaneous						
47001500 - Late Fee Revenue	4,662	0	0	0	4,662	7,497
49009000 - Miscellaneous Revenue	963	0	396	0	1,360	0
Total Miscellaneous	5,625	0	396	0	6,021	7,497
Total Non-Assessment Revenue	1,817,161	86,989	479,652	1,206,708	3,590,511	3,618,702
Expenses:						
Employee Compensation						
51011000 - Salaries & Wages - Regular	439,209	292,153	167,234	8,822	907,418	988,918
51041000 - Wages - Overtime	9,960	2,610	1,632	23	14,225	4,275
51061000 - Holiday & Vacation	42,852	27,901	5,950	728	77,431	74,171
51071000 - Sick	12,527	3,242	2,147	223	18,139	30,254
51091000 - Missed Meal Penalty	759	1,239	50	17	2,064	1,305
51101000 - Temporary Help	0	0	0	0	0	747
51981000 - Compensation Accrual	(10,743)	(5,187)	(1,803)	(229)	(17,961)	2,619
Total Employee Compensation	494,565	321,957	175,211	9,583	1,001,316	1,102,290
Compensation Related						
52411000 - F.I.C.A.	37,294	23,996	13,002	742	75,034	83,641
52421000 - F.U.I.	493	313	84	6	897	1,753
52431000 - S.U.I.	3,783	2,397	644	48	6,873	7,460
52451000 - Workers' Compensation Insurance	38,739	29,878	2,380	636	71,633	30,828
52461000 - Non Union Medical & Life Insurance	47,517	33,468	8,638	1,154	90,777	108,743
52481000 - Non-Union Retirement Plan	11,123	10,306	7,080	0	28,509	42,392
52981000 - Compensation Related Accrual	(6,169)	(4,091)	(824)	(128)	(11,212)	1,197
Total Employee Compensation and Related	132,783	96,266	31,004	2,458	262,511	276,014
Materials and Supplies						
53001000 - Materials & Supplies	27,428	6,635	1,683	6	35,753	35,310
53004000 - Freight	1,012	21	34	0	1,066	1,125
Total Materials and Supplies	28,441	6,656	1,717	6	36,819	36,435
Utilities and Telephone						
53301000 - Electricity	109,715	0	0	0	109,715	96,600
Total Utilities and Telephone	109,715	0	0	0	109,715	96,600
Legal Fees						
53401500 - Legal Fees	0	0	0	0	0	1,872
Total Legal Fees	0	0	0	0	0	1,872
Outside Services						
53601500 - Credit Card Transaction Fees	55,633	0	4,873	0	60,505	44,244
53602500 - Licensing Fees	0	0	5,900	0	5,900	4,419

**Golden Rain Foundation of Laguna Woods
Proforma Broadband Services Summary of Operations
9/30/2019**

	<u>Cable Television</u>	<u>TV6</u>	<u>Ad Insertion</u>	<u>Internet</u>	<u>YTD ACTUAL</u>	<u>YTD BUDGET</u>
53704000 - Outside Services	359,055	55,041	2,545	0	416,641	388,800
Total Outside Services	414,688	55,041	13,318	0	483,047	437,463
Repairs and Maintenance						
53701000 - Equipment Repair & Maint	2,917	0	59	0	2,976	33,534
Total Repairs and Maintenance	2,917	0	59	0	2,976	33,534
Other Operating Expense						
53801000 - Mileage & Meal Allowance	14	0	2,382	0	2,397	3,078
53801500 - Travel & Lodging	224	1,674	45	45	1,989	4,747
53802000 - Uniforms	1,394	0	0	0	1,394	1,494
53802500 - Dues & Memberships	2,415	0	0	0	2,415	2,277
53803000 - Subscriptions & Books	0	0	58	0	58	72
53803500 - Training & Education	0	1,175	31	0	1,206	1,000
53901500 - Volunteer Support	0	0	0	0	0	72
54502500 - Cable Promotions	0	0	1,452	0	1,452	2,619
Total Other Operating Expense	4,048	2,849	3,968	45	10,910	15,359
Property and Sales Tax						
54301500 - State & Local Taxes	1,651	148	0	0	1,800	144
54302000 - Property Taxes	9	7	0	2	19	0
Total Property and Sales Tax	1,660	156	0	2	1,818	144
Cable Programming/Copyright/Franchise						
54501000 - Cable - Programming Fees	3,621,840	0	0	0	3,621,840	3,449,997
54501500 - Cable - Copyright Fees	0	0	0	0	0	41,247
54502000 - Cable - City of Laguna Woods Franchise Fees	192,554	4,422	30,661	0	227,637	200,619
Total Cable Programming/Copyright/Franchise	3,814,394	4,422	30,661	0	3,849,476	3,691,863
Uncollectible Accounts						
54602000 - Bad Debt Expense	5,370	0	0	0	5,370	18,927
Total Uncollectible Accounts	5,370	0	0	0	5,370	18,927
Total Expenses	5,008,580	487,348	255,937	12,094	5,763,958	5,710,501
Net Revenue/(Expense)	(\$3,191,419)	(\$400,358)	\$223,715	\$1,194,614	(\$2,173,448)	(\$2,091,799)

Variance -\$81,649.00 or -3.99%

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STAFF REPORT

DATE: October 21, 2019
FOR: GRF Media and Communications Committee
SUBJECT: Marketing and Communications Activities Report - September 2019

RECOMMENDATION

Review Marketing and Communications Report.

BACKGROUND

Marketing and Communications (MarComm) staff prepare a monthly report for MACC. This report includes, but is not limited to, MarComm activities, communications projects, website management, analytics, CodeRED enrollment and more.

DISCUSSION

The website is an ever-evolving information hub updated daily via input from all departments, residents and clubs. MarComm maintains webmaster duties by writing, editing and posting content, which includes, but is not limited to, governance, news, club news, training, activities and calendars.

MarComm staff continues to assist other departments with flyers, brochures, posters, signs, emails, letters and video monitor slides. A key project has been assisting in the elections process, which included editing voting/mailling materials, announcing candidates, producing year-end presentations for each mutual and the VMS CEO, completing and distributing director handbooks, announcing new directors and obtaining photos of new directors.

MarComm staff continues to proactively engage, inform and share vital information with residents. The attached report presents engagement efforts in September through the iContact direct email service, flyers, newsletters and other tools used to disseminate news and information. The average open and click rates explain interest and engagement in the content disseminated.

Workflow continues to be managed through the online project management system, Trello, which tracks work performed by staff and a freelance graphic artist, including deadlines, content, artwork, editing, fact checking, graphic design and distribution. In the month of September, MarComm tracked **33** projects through Trello.

Regular publications completed by the MarComm team in September include:

- Easy Rider Transportation Newsletter (print and eblast)
- Employee Newsletter (print and eblast)
- Recreation Events and Activities Calendar (print and website)

- Recreation Events Calendar (eblast)
- Village Breeze (print and eblast)
- What's Up in the Village (Friday eblast): Three editions and one special elections edition

The weekly What's Up in the Village Friday eblast and monthly issue of the Village Breeze are distributed through iContact. In addition, 800 print copies of the Village Breeze are distributed at the library, clubhouses, the Towers and the Community Center. Since February, copies are being distributed through the Social Services Division's Friendly Visitor Program when staff makes house calls.

MarComm staff also maintains specific email lists for select recipients to allow for more targeted communication while reducing communication fatigue. Current specialized lists include pool users, golf cart owners, Garden Center plot holders and real estate professionals. MarComm also can send email communications to Village residents, VMS employees and directors on each of the boards.

Current key messages that MarComm delivered in September include:

- New EV chargers
- Voting
- Pool closure
- History Center new board member
- RSVP to Senior Scam Stopper Seminar
- GRF Board of Directors elections
- Village Earthquake Expo
- DwellingLive
- Excursions
- South County outreach seeks volunteers
- Landscaping picks up garden clippings on Fridays
- Tree trimming at Aliso Creek
- Third turf renovation process
- Solar panel cleaning scheduled for Third and United
- Clubhouse 4 arts and crafts Bonanza
- Monday night football
- Gate 14 landscape modernization
- Waste Management offers cart valet service
- Enroll in EZPay
- Prevent mosquito bites, eliminate breeding sources
- Why you should report vacant manors
- Simplify guest access for everyone
- Stay tuned for special election results
- Laguna Coast Wilderness wildlife movement
- Special Olympics Orange County seeks volunteers

Additionally, MarComm assisted other departments, staff, directors and outside agencies with the following projects in September:

- Notified staff and residents about planned power outages in the community;
- Passed vital information to Resident Services so they can be prepared with answers when residents call with questions; and
- Press relations, including disseminating press releases to the Laguna Woods Globe.

FINANCIAL ANALYSIS

None

Prepared By: Eileen Paulin, Marketing and Communications Manager
Becky Jackson, Public Relations Specialist

Reviewed By: Siobhan Foster, COO

Workflow Report, September 2019

Recreation	Webmaster
Recreation Blast-October	Posted 145 documents
Harvest Hoedown 2019	Security
Timeless Melodies: Frank Sinatra Part II	EOP Update
Yoga for Golf flyer	Earthquake Expo Program
Bonanza 2019 Flyer	Good Neighbor Flyer update 09232019
Coco Sunday Matinee	Human Resources
Stress-Less Meditation Class update	Employee NL Sep2019
Pour and Paint Oct 2019	Marketing and Communications
Landscape	Whats Up 9-27-19
Landscape Activities 09-02-2019	Village Breeze Media Kit
Landscape Activities 09-09-2019	New Village Map
Landscape Activities 09-16-2019	Whats Up 9-6-19
Landscape Activities 09-23-2019	Village Breeze
Landscape Activities 09-30-2019	Whats Up 9-13-19
CodeRED	Board Relations
Entered 134	United End of Year Presentation
Village Television	GRF End of Year Presentation
TV Guide Redesign	CEO Presentation
Transportation	Third End of Year Presentation
Oct 2019 Transportation NL	Maintenance/Construction
Social Services	Maint Schedules Oct 2019 - Format
What Matters to You	GRF, Third, United Maint Logs - Format

iContact Report, September 2019

Date	Title	Contacts	Open	Bounce	No Info.	Clicks	Smartphone	Tablet	Computer	Unsubscribe	Complained
9/4/2019	Pool 5 Temporarily Closed	210	63.8%	2.4%	34.3%	13.0%	30.0%	17.0%	53.0%	0	0
9/6/2019	What's Up	11,978	43.5%	0.4%	56.2%	17.0%	35.0%	25.0%	40.0%	6	1
9/10/2019	Breeze	11,970	45.0%	0.4%	54.7%	24.0%	35.0%	25.0%	40.0%	10	0
9/11/2019	Employee NL	267	44.6%	0.0%	55.8%	35.0%	4.0%	1.0%	95.0%	0	0
9/12/2019	Third: Vote Counts!	7,614	44.8%	5.1%	50.1%	0.0%	47.0%	24.0%	28.0%	11	1
9/13/2019	What's Up	12,317	44.2%	0.5%	55.4%	15.0%	39.0%	25.0%	37.0%	13	2
9/20/2019	Community Website Out	11,704	45.9%	0.4%	53.9%	0.0%	43.0%	24.0%	32.0%	7	0
9/25/2019	Easy Rider	11,692	36.2%	0.4%	63.5%	11.0%	36.0%	23.0%	40.0%	5	0
9/25/2019	Pool 1 Notice	191	66.0%	0.0%	34.0%	12.0%	50.0%	13.0%	37.0%	0	0
9/25/2019	Rec Events Cal	11,690	39.7%	0.4%	60.0%	15.0%	41.0%	23.0%	35.0%	3	0
9/27/2019	What's Up	11,934	40.8%	0.4%	58.9%	19.0%	38.0%	23.0%	39.0%	3	0
			Averages								Totals
			46.8%	0.9%	52.4%	14.6%	36.2%	20.3%	43.3%	58	4

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STAFF REPORT

DATE: October 21, 2019
FOR: GRF Media and Communications Committee
SUBJECT: Docent Tour Update

RECOMMENDATION

Review the Docent Tour Update.

BACKGROUND

Docent tours, in effect since 2001, were originally conducted by the Historical Society and averaged 33 tours per year. In 2010, Sales and Leasing took over, eventually tripling the number of tours to 98 per year by 2017. As of April 2018, Marketing and Communications (MarComm) assumed responsibility for the tours. MarComm staff evaluated the program and scaled the schedule to 73 in 2018 and 66 in 2019, decreasing tours by 32.7 percent to reduce operational strain on Transportation while maintaining full buses and leaving a minimal wait list.

To maintain quality control, tours were streamlined and follow a specific route with no deviation. Guests provide continual feedback via an email questionnaire. Quarterly meetings with tour docents act to troubleshoot and enhance the program. MarComm has provided a monthly report to the GRF Media and Communications Committee in the Marketing and Communications Activities Report. The report includes feedback, number of tours, attendance, how participants heard about the tours and whether the participants were prospective buyers, residents or real estate agents.

DISCUSSION

Starting January 2020, Transportation proposes implement a new fixed-route system featuring nine buses in lieu of the previous eight, requiring Transportation to carefully evaluate the provision of non-core services. MarComm has been asked to evaluate opportunities to reduce the tours.

Thus far, no quantitative data is available regarding the correlation between tours and sales—only qualitative data provided via New Resident Orientations and surveys. Residents evaluate their tour experience (it was memorable; instrumental in their decision-making process, etc.). Guests frequently remember their docent and maintain contact after move in. Docent tours are a confirmed exemplary marketing tool for the Village and an opportunity for guests view amenities in person.

Based on guest feedback, tours have been offered in three formats: weekly prospective buyer tours, a monthly resident tour and a quarterly real estate agent tour. This allows prospective buyers the opportunity to view the Village without the distraction of agents attempting to solicit or residents providing inaccurate information. For 2020, MarComm will be considering the following options to scale the schedule:

- a) Sixty-eight tours: prospective buyer tours on the first four Thursdays of each month and the fourth Saturday of each month. Retain the new resident tour on the fourth Thursday of the month. This option allows the opportunity to hold a realtor tour if demand necessitates such.
- b) Sixty tours: prospective buyer tours on the first four Thursdays of each month and the fourth Saturday of each month. Provide new resident tours on the fifth Thursday of each month and offer standby options regarding other tours.
- c) Fifty-eight tours: prospective buyer tours on the first four Thursdays of each month and the fourth Saturday of each month. Residents who wish to attend must remain on standby.

These options exclude holidays.

FINANCIAL ANALYSIS

None

Prepared By: Becky Jackson, Public Relations Specialist

Reviewed By: Siobhan Foster, COO

Historical Society 2001-2009

2001	Number of Tours	Resident	Visitor	On Bus
	13	67	128	195
2002	Number of Tours	Resident	Visitor	On Bus
	28	194	208	402
2003	Number of Tours	Resident	Visitor	On Bus
	32	253	318	571
2004	Number of Tours	Resident	Visitor	On Bus
	34	201	342	543
2005	Number of Tours	Resident	Visitor	On Bus
	36	85	253	338
2006	Number of Tours	Resident	Visitor	On Bus
	31	112	267	379
2007	Number of Tours	Resident	Visitor	On Bus
	31	124	172	296
2008	Number of Tours	Resident	Visitor	On Bus
	31	174	89	263
2009	Number of Tours	Resident	Visitor	On Bus
	36	133	210	343

Sales and Leasing 2010-2015

2010	Number of Tours	Resident	Visitor	On Bus
	30	139	335	474
2011	Number of Tours	Resident	Visitor	On Bus
	33	93	343	440
2012	Number of Tours	Resident	Visitor	On Bus
	34	150	384	521
2013	Number of Tours	Resident	Visitor	On Bus
	34	163	392	547
2014	Number of Tours	Resident	Visitor	On Bus
	34	144	458	602
2015	Number of Tours	Resident	Visitor	On Bus
	43	211	656	853

Sales and Leasing 2015-2017 (tours doubled)

2016	Number of Tours	Resident	Visitor	On Bus
	90	417	1285	1702
2017	Number of Tours	Resident	Visitor	On Bus
	98	335	1482	1817

MarComm April 2018-Now

2018	Number of Tours	Resident	Visitor	On Bus
	73	326	1094	1420
2019	Number of Tours	Resident	Visitor	On Bus
Jan-Sept.	49 (done) + 17 (pending) = 66	223	914	914

Option A-68 Tours

Thursday, January 02, 2020	1 p.m.	Thursday, June 25, 2020	1 p.m.
Thursday, January 09, 2020	9 a.m.	Saturday, June 27, 2020	9 a.m.
Thursday, January 16, 2020	1 p.m.	Thursday, July 02, 2020	1 p.m.
Thursday, January 23, 2020	9 a.m.	Thursday, July 09, 2020	9 a.m.
Thursday, January 23, 2020	1 p.m.	Thursday, July 16, 2020	1 p.m.
Saturday, January 25, 2020	9 a.m.	Thursday, July 23, 2020	9 a.m.
Thursday, February 06, 2020	1 p.m.	Thursday, July 23, 2020	1 p.m.
Thursday, February 13, 2020	9 a.m.	Saturday, July 25, 2020	9 a.m.
Thursday, February 20, 2020	1 p.m.	Thursday, August 06, 2020	1 p.m.
Saturday, February 22, 2020	9 a.m.	Thursday, August 13, 2020	9 a.m.
Thursday, February 27, 2020	9 a.m.	Thursday, August 20, 2020	1 p.m.
Thursday, February 27, 2020	1 p.m.	Saturday, August 22, 2020	9 a.m.
Thursday, March 05, 2020	1 p.m.	Thursday, August 27, 2020	9 a.m.
Thursday, March 12, 2020	9 a.m.	Thursday, August 27, 2020	1 p.m.
Thursday, March 19, 2020	1 p.m.	Thursday, September 03, 2020	1 p.m.
Thursday, March 26, 2020	9 a.m.	Thursday, September 10, 2020	9 a.m.
Thursday, March 26, 2020	1 p.m.	Thursday, September 17, 2020	1 p.m.
Saturday, March 28, 2020	9 a.m.	Thursday, September 24, 2020	9 a.m.
Thursday, April 02, 2020	1 p.m.	Thursday, September 24, 2020	1 p.m.
Thursday, April 09, 2020	9 a.m.	Saturday, September 26, 2020	9 a.m.
Thursday, April 16, 2020	1 p.m.	Thursday, October 01, 2020	1 p.m.
Thursday, April 23, 2020	9 a.m.	Thursday, October 08, 2020	9 a.m.
Thursday, April 23, 2020	1 p.m.	Thursday, October 15, 2020	1 p.m.
Saturday, April 25, 2020	9 a.m.	Thursday, October 22, 2020	9 a.m.
Thursday, May 07, 2020	1 p.m.	Thursday, October 22, 2020	1 p.m.
Thursday, May 14, 2020	9 a.m.	Saturday, October 24, 2020	9 a.m.
Thursday, May 21, 2020	1 p.m.	Thursday, November 05, 2020	1 p.m.
Saturday, May 23, 2020	9 a.m.	Thursday, November 12, 2020	9 a.m.
Thursday, May 28, 2020	9 a.m.	Thursday, November 19, 2020	9 a.m.
Thursday, May 28, 2020	1 p.m.	Thursday, November 19, 2020	1 p.m.
Thursday, June 04, 2020	1 p.m.	Thursday, December 03, 2020	1 p.m.
Thursday, June 11, 2020	9 a.m.	Thursday, December 10, 2020	9 a.m.
Thursday, June 18, 2020	1 p.m.	Thursday, December 17, 2020	9 a.m.
Thursday, June 25, 2020	9 a.m.	Thursday, December 17, 2020	1 p.m.

Option B-60 Tours

Thursday, January 02, 2020	1 p.m.	Thursday, June 25, 2020	9 a.m.
Thursday, January 09, 2020	9 a.m.	Saturday, June 27, 2020	9 a.m.
Thursday, January 16, 2020	1 p.m.	Thursday, July 02, 2020	1 p.m.
Thursday, January 23, 2020	9 a.m.	Thursday, July 09, 2020	9 a.m.
Saturday, January 25, 2020	9 a.m.	Thursday, July 16, 2020	1 p.m.
Thursday, January 30, 2020	1 p.m.	Thursday, July 23, 2020	9 a.m.
Thursday, February 06, 2020	1 p.m.	Saturday, July 25, 2020	9 a.m.
Thursday, February 13, 2020	9 a.m.	Thursday, July 30, 2020	1 p.m.
Thursday, February 20, 2020	1 p.m.	Thursday, August 06, 2020	1 p.m.
Saturday, February 22, 2020	9 a.m.	Thursday, August 13, 2020	9 a.m.
Thursday, February 27, 2020	9 a.m.	Thursday, August 20, 2020	1 p.m.
Thursday, March 05, 2020	1 p.m.	Saturday, August 22, 2020	9 a.m.
Thursday, March 12, 2020	9 a.m.	Thursday, August 27, 2020	9 a.m.
Thursday, March 19, 2020	1 p.m.	Thursday, September 03, 2020	1 p.m.
Thursday, March 26, 2020	9 a.m.	Thursday, September 10, 2020	9 a.m.
Saturday, March 28, 2020	9 a.m.	Thursday, September 17, 2020	1 p.m.
Thursday, April 02, 2020	1 p.m.	Thursday, September 24, 2020	9 a.m.
Thursday, April 09, 2020	9 a.m.	Saturday, September 26, 2020	9 a.m.
Thursday, April 16, 2020	1 p.m.	Thursday, October 01, 2020	1 p.m.
Thursday, April 23, 2020	9 a.m.	Thursday, October 08, 2020	9 a.m.
Saturday, April 25, 2020	9 a.m.	Thursday, October 15, 2020	1 p.m.
Thursday, April 30, 2020	1 p.m.	Thursday, October 22, 2020	9 a.m.
Thursday, May 07, 2020	1 p.m.	Saturday, October 24, 2020	9 a.m.
Thursday, May 14, 2020	9 a.m.	Thursday, October 29, 2020	1 p.m.
Thursday, May 21, 2020	1 p.m.	Thursday, November 05, 2020	1 p.m.
Saturday, May 23, 2020	9 a.m.	Thursday, November 12, 2020	9 a.m.
Thursday, May 28, 2020	9 a.m.	Thursday, November 19, 2020	1 p.m.
Thursday, June 04, 2020	1 p.m.	Thursday, December 03, 2020	1 p.m.
Thursday, June 11, 2020	9 a.m.	Thursday, December 10, 2020	9 a.m.
Thursday, June 18, 2020	1 p.m.	Thursday, December 17, 2020	1 p.m.

Option C-56 Tours

Thursday, January 02, 2020	1 p.m.	Thursday, June 25, 2020	9 a.m.
Thursday, January 09, 2020	9 a.m.	Saturday, June 27, 2020	9 a.m.
Thursday, January 16, 2020	1 p.m.	Thursday, July 02, 2020	1 p.m.
Thursday, January 23, 2020	9 a.m.	Thursday, July 09, 2020	9 a.m.
Saturday, January 25, 2020	9 a.m.	Thursday, July 16, 2020	1 p.m.
Thursday, February 06, 2020	1 p.m.	Thursday, July 23, 2020	9 a.m.
Thursday, February 13, 2020	9 a.m.	Saturday, July 25, 2020	9 a.m.
Thursday, February 20, 2020	1 p.m.	Thursday, August 06, 2020	1 p.m.
Saturday, February 22, 2020	9 a.m.	Thursday, August 13, 2020	9 a.m.
Thursday, February 27, 2020	9 a.m.	Thursday, August 20, 2020	1 p.m.
Thursday, March 05, 2020	1 p.m.	Saturday, August 22, 2020	9 a.m.
Thursday, March 12, 2020	9 a.m.	Thursday, August 27, 2020	9 a.m.
Thursday, March 19, 2020	1 p.m.	Thursday, September 03, 2020	1 p.m.
Thursday, March 26, 2020	9 a.m.	Thursday, September 10, 2020	9 a.m.
Saturday, March 28, 2020	9 a.m.	Thursday, September 17, 2020	1 p.m.
Thursday, April 02, 2020	1 p.m.	Thursday, September 24, 2020	9 a.m.
Thursday, April 09, 2020	9 a.m.	Saturday, September 26, 2020	9 a.m.
Thursday, April 16, 2020	1 p.m.	Thursday, October 01, 2020	1 p.m.
Thursday, April 23, 2020	9 a.m.	Thursday, October 08, 2020	9 a.m.
Saturday, April 25, 2020	9 a.m.	Thursday, October 15, 2020	1 p.m.
Thursday, May 07, 2020	1 p.m.	Thursday, October 22, 2020	9 a.m.
Thursday, May 14, 2020	9 a.m.	Saturday, October 24, 2020	9 a.m.
Thursday, May 21, 2020	1 p.m.	Thursday, November 05, 2020	1 p.m.
Saturday, May 23, 2020	9 a.m.	Thursday, November 12, 2020	9 a.m.
Thursday, May 28, 2020	9 a.m.	Thursday, November 19, 2020	1 p.m.
Thursday, June 04, 2020	1 p.m.	Thursday, December 03, 2020	1 p.m.
Thursday, June 11, 2020	9 a.m.	Thursday, December 10, 2020	9 a.m.
Thursday, June 18, 2020	1 p.m.	Thursday, December 17, 2020	1 p.m.

STAFF REPORT

DATE: October 21, 2019
FOR: GRF Media and Communications Committee
SUBJECT: New Resident Orientation Update

RECOMMENDATION

Review the New Resident Orientation Update.

BACKGROUND

New resident orientation (NRO) events began in October 2001. In 2002, events occurred primarily during morning hours; only four evening sessions were held. In 2003, NRO events were held every other month during evening hours. In 2004, only morning meetings were held. In 2005, joint NROs, with both Third and United residents took place. In 2006, the schedule reverted to mutual NROs held separately, with one NRO per mutual per month in the mornings. Evening NROs began in 2017.

DISCUSSION

Evening NROs appeal to residents who work and are unable to attend the morning session. Evening sessions, which begin at 6 p.m., have result in staff working significant extra hours beyond the end of the regular work schedule. The proposed 2020 NRO schedule features evening sessions at 4:30 p.m., allowing staff to leave work on time and the hosting director to return home for dinner.

FINANCIAL ANALYSIS

None

Prepared By: Becky Jackson, Public Relations Specialist
Reviewed By: Siobhan Foster, COO

New Resident Orientations 2018

New Resident Orientation Attendance

United			Third		
Date	Attend	Director	Date	Attend	Director
1/10/2018	28	Skillman	Cancel	0	
2/2/2018	22	Dorrell	2/21/2018	27	Moldow
3/14/2018	29	Tibbetts	3/16/2018	20	Caine
4/6/2018	27	Blackwell	4/18/2018	13	Tung
5/9/2018	22	Morrison	5/18/2018	26	Carpenter
6/1/2018	0	Cancel	6/20/2018	24	Walsh
7/11/2018	22	Skillman	7/20/2018	13	Frankel
8/3/2018	14	English	8/15/2018	24	Bruninghaus
9/12/2018	23	Achrekar	9/21/2018	40	Baum
10/5/2018	18	Skillman	10/17/2018	16	Bruninghaus
11/14/2018	11	Armendariz	11/16/2018	32	Parsons
12/7/2018	12	Skillman	12/19/2018	0	Cancel
Total YTD	228		Total YTD	235	

New Resident Orientations 2019

United Mutual		
Date	Attendance	Director
Wednesday, January 9, 2019	0	Canceled
Friday, February 01, 2019	20	Skillman
Wednesday, March 13, 2019	32	Morrison
Friday, April 05, 2019	18	Blackwell
Wednesday, May 08, 2019	0	Canceled
Friday, June 07, 2019	37	Addington
Wednesday, July 10, 2019	29	Randazzo
Friday, August 02, 2019	18	Armendariz
Wednesday, September 11, 2019	22	Addington
Friday, October 04, 2019	0	Canceled
Wednesday, November 13, 2019		Tornig
Friday, December 06, 2019		Skillman
Total YTD	176	
Third Mutual		
Date	Attendance	Director
Friday, January 18, 2019	45	Frankel
Wednesday, February 20, 2019	32	Carpenter
Friday, March 15, 2019	0	Canceled
Wednesday, April 17, 2019	21	Parsons
Friday, May 17, 2019	10	Bruninghaus
Wednesday, June 19, 2019	26	Pearlstone
Friday, July 19, 2019	19	Frankel
Wednesday, August 21, 2019	24	McCary
Friday, September 20, 2019	13	Pearlstone
Wednesday, October 16, 2019		Parsons
Friday, November 15, 2019		Carpenter
Wednesday, December 18, 2019		Pearlstone
Total YTD	190	

United 2020 Schedule

Date	Time	Location	Director
Wednesday, January 08, 2020	4:30 p.m.	Board Room	
Friday, February 07, 2020	9 a.m.	Board Room	
Wednesday, March 11, 2020	4:30 p.m.	Board Room	
Friday, April 03, 2020	9 a.m.	Board Room	
Wednesday, May 13, 2020	4:30 p.m.	Board Room	
Friday, June 05, 2020	9 a.m.	Board Room	
Wednesday, July 08, 2020	4:30 p.m.	Board Room	
Friday, August 07, 2020	9 a.m.	Board Room	
Wednesday, September 09, 2020	4:30 p.m.	Board Room	
Friday, October 02, 2020	9 a.m.	Board Room	
Wednesday, November 11, 2020	4:30 p.m.	Board Room	
Friday, December 04, 2020	9 a.m.	Board Room	

Third 2020 Schedule

Date	Time	Location	Director
Friday, January 17, 2020	9 a.m.	Board Room	Frankel
Wednesday, February 19, 2020	4:30 p.m.	Board Room	Carpenter
Friday, March 20, 2020	9 a.m.	Board Room	McCary
Wednesday, April 15, 2020	4:30 p.m.	Board Room	Bhada
Friday, May 15, 2020	9 a.m.	Board Room	Karimi
Wednesday, June 17, 2020	4:30 p.m.	Board Room	Pearlstone
Friday, July 17, 2020	9 a.m.	Board Room	Engdahl
Wednesday, August 19, 2020	4:30 p.m.	Board Room	Wayne
Friday, September 18, 2020	9 a.m.	Board Room	Bhada
Wednesday, October 21, 2020	4:30 p.m.	Board Room	Parsons
Friday, November 20, 2020	9 a.m.	Board Room	McCary
Wednesday, December 16, 2020	4:30 p.m.	Board Room	Pearlstone