

SUMMARY OF RESPONSES TO ORANJ TRANSPARENCY SURVEY

(Appendix A)

1. How well informed, on matters which affect their living, do residents feel the board and management keeps them?
Very well informed (5), Well informed (9), Fairly well informed(8), Fairly poorly informed (0), Poorly informed (0), Very Poorly informed (0)
2. How well informed, in a timely manner, do officers and committee chairs feel the board and management keeps them?
Very well informed (5), Well informed (11), Fairly well informed(5), Fairly poorly informed (0) Poorly informed (0) Very Poorly informed (0)
3. Do you have a Resident Association `composed of all residents?
Yes (21) No (1)
4. If Yes, how often does it meet? (4)Annually, Quarterly (2), Monthly (9), Other (6)
5. Do you have a Resident Advisory Council (RAC), or Executive Committee , elected by the Association, that relates to management on behalf of residents? (21) Yes, (1) No,
6. If yes, how often does it meet in sessions open to all residents?
(9) Monthly, (2) Quarterly, (5) Never, (2) Other
7. Does it meet for closed working sessions? (18) Yes, (3) No
8. If Yes, how often does it meet in a working session without other residents in attendance?
(12) Monthly, (1) Quarterly, (0) Never, (3) Other
9. How often does your RAC/Exec. Committee President meet with the manager/CEO of your CCRC?
(1)Quarterly, (6)Monthly, (12)Whenever needed, (3) Other, (0) Never

Committees

Question #10 Which of your Resident led committees carry out the following functions? (note: In Question 10 six committees are listed for each function - several committees may carry out any given function.)

[B] Serves in an advisory capacity to management

(11) Food Services, (4) Marketing, (8) Resident Activities, (7) Finance,
(11) Property Maintenance including Housekeeping, (9) Health and Wellness

[C] Communicates management's positions in public meetings

(6) Food Services, (2) Marketing, (4) Resident Activities, (4) Finance,
(5) Property Maintenance including Housekeeping, (5) Health and Wellness

[D] Conveys complaints of individual residents to management

(15) Food Services, (3) Marketing, (11) Resident Activities, (4) Finance,

(13) Property Maintenance including Housekeeping, (9) Health and Wellness

[E] Passes management's answers back to individual concerned residents.

(9) Food Services, (3) Marketing, (9) Resident Activities, (5) Finance,

(9) Property Maintenance including Housekeeping, (6) Health and Wellness

[F] Committee chair meets with management counterpart about once a month.

(7) Food Services, (3) Marketing, (5) Resident Activities, (7) Finance,

(5) Property Maintenance including Housekeeping 5) Health and Wellness

[G] Whole committee meets with management counterpart about once a month.

(14) Food Services, (3) Marketing, (8) Resident Activities, (9) Finance,

(7) Property Maintenance including Housekeeping, (9) Health and Wellness

11. How good is management's relationship with these committees?

(9) Excellent, (10) Very Good, (3) Good, () Fair, () Poor,

12. Are committee suggestions evaluated by management, and answers reported to the committee or to residents, as appropriate?

(10) Always, (11) Usually, (1) Rarely, () Never

13. How often do committee chairs report to residents in open meetings?

(12) Monthly, (2) Quarterly, (4) Annually, (2) Other_, () Never

14. Does management ever appoint special committees (such as an energy committee) consisting of both management specialists and residents?

(14) Yes, (6) No --- If Yes, please give examples:

Resident Member of the Governing Board or Trustees

15. Does one of your residents serve as a full voting member on your governing Board?

(22) Yes, (0) No

16. Has he/she been appointed to any Board committees or been given special assignments?

(9) Yes, (12) No -- If yes, what assignment or committees?

17. How often does the resident member of the board of directors attend the closed working sessions of the Resident Advisory Council or Executive Committee?

(12) At all working meetings, (4) Only on invitation of the RAC /Executive Com, (4) Never

18. How often does the resident member of the board of directors attend open meetings of the Resident Advisory Council or Executive Committee?

(17) At all open meetings, (2) Only on invitation of the RAC /Executive Com, (2) Never

19. Does she/he share appropriate information about the Boards business? (14) Yes, (6) No

Other Board Members

20. How often do one or more members of the governing Board, other than the resident board member or CEO, meet in closed working meetings of your RAC or Executive Committee? (10) 2 or more times a year, (1) Once a year, (8) Never

21. How often do one or more members of the governing Board, or their representatives, meet in open meeting with all residents? (9) Several times a year, (6) Once a year, (5) Never

22. Do they take questions from the residents? (16) Yes, (1) No

23. Are their answers helpful and relevant to concerns of residents? (15) Yes, (0) No

24. Does a member of your board of directors, or a designated representative, who is not the chief executive officer or other staff member, hold quarterly meetings with your residents, or their elected representatives? (24) Yes, (9) No

Finance Committee

25. Does your resident Finance Committee include in its membership one or more accountants, retired business executives or persons with other financial experience? (19) Yes, (2) No

26. Does the Finance Committee receive certain information for its use only? (10) Yes, (11) No

27. How often does management's Financial Officer meet with the resident Finance Committee? (3) Monthly, (1) Bi-Monthly, (12) Quarterly, (1) Semi-Annually, (1) Never, (1) Other

28. How often is a standard financial reporting package (see #29 below) distributed to the resident Finance Committee? (2) Annually, (3) Semi-Annually, (9) Quarterly, (3) Monthly, (1) Other, (3) Never

29. Which of the following are included in the Standard Financial Package given to the committee? (Check all that Finance Committee receives.)

- (A) Statement of Operations by Actual Expense compared to the Budget,
- (B) Statement of Non-Operating Items such as interest income and expense, realized and unrealized gains and losses,
- (C) Comparative Balance Sheet,
- (D) Statement of Cash Flows,
- (E) Breakdown of major other actual expenses compared to budget such as
- (F) Utilities, (G) Real Estate Taxes, (H) Latest Disclosure Statement,
- (I) Insurance - property, non-property and general liability.

The Q29 Table gives detail on how large, medium, small, and very small CCRCs answered this question. Go to table

30. Does management solicit input from the RAC and Finance Committee for Capital Expenditures? (10) Yes, (9) No, () Not applicable

31. Does management discuss long term debt obligations and their funding with the Finance Committee? (18) Yes, (2) No

32. Prior to implementation, does management review with the Finance Committee proposed changes in services (such as new charges for formerly free services)?

(10) Yes,(8) No

33. In what ways does management involve your Finance Committee in budget development?

(8) In preliminary discussions of draft budget as it is being developed.

(8) In discussions of projected future rate increases.

(9) In reviewing the draft budget before its approval.

(7) In reviewing the board approved budget before it is announced to the RAC/Exec Com.

(7) In reviewing the board approved budget before it is announced to the Residents.

(5) Not at all.

The Q33 Table gives detail on how large, medium, small, and very small CCRCs answered this question. Go to table

34. Does management reply to suggestions made by the Finance Committee during the Annual budget process? (10) Yes (9) No

35. What kinds of information does board and management keep confidential from the Finance Committee? Check all that apply.

(20) Confidential personnel matters (salaries and staffing numbers)

(14) Final budget proposals before approval by Board (1) Other

36. Is the public disclosure copy of IRS Form 990 made available. (Check all that apply)

(7) To the Finance Committee? (8) To residents on request? (9) Not made available

37. What financial information does management distribute or make available to all residents?

Check all that apply. (12) Its Annual Report? (13) The annual audited financial

(9) Occasional Oral Broad Comment on quarterly financial results?(4) Other

38. Does your CCRC have a cost reduction program? (10) Yes (6) No

39. If "yes," are any resident committees involved in the program? (2) Yes(12) No

If "yes," How? Check all that apply

() In developing the program. (4) In making suggestions.

() In reviewing its progress . () Other

General Communication with Management

40. How often does management hold open meetings with residents to update them on what is happening and to answer their questions?

() Once a year (4) Two or more times a year (3) Quarterly (14) Monthly (2) When major decisions are being made () Never

41. Do these meetings usually provide information which residents find to be timely, and helpful? (19) Yes () No

42. Do residents feel that management? (Check all that apply)

- (21) Encourages questions, and answers them honestly?
- (2) Would rather not hear their questions but answers them cautiously?
- () Avoids answering questions whenever possible?

43. Do most residents feel that management's communication with them is
(3) Excellent? (14) Very Good? (2) Average? (1) Fair? () Poor?

44. Does your management have an "open door" policy which welcomes unscheduled visits from residents? (21) Yes (1) No

45. Are phone calls to management by RAC or Executive Committee members usually handled promptly? (20) Yes (1) No 46. If no, how long does it take to obtain a response? __ (No answers)

47. Are phone calls to management by residents usually handled promptly? (19) Yes (3) No 48. If no, how long does it take to obtain a response?

49. Are e-mails to management by RAC or Executive Committee members usually handled promptly? (15) Yes (0) No 50. If no, how long does it take to obtain a response?

51. Are e-mails to management from other residents usually handled promptly? (13) Yes (0) No
52. If no, how long does it take to obtain a response? ()

53. How long does it take to schedule meetings with management?
(3) a week () two weeks (4) Fast (2) Timely

54. How useful do you feel the information in the report of this study will be to your community?
(2) Very useful (6) Fairly useful (11) Of some interest (2) Not likely to be useful

2010 TRANSPARENCY STUDY

Question 33 -- Budget Development

Finance Committee Involvement in Budget Development

---Each line of 1's represents the Finance Committee of a particular Association

-- Each 1 in the chart represents participation by that Finance Committee in a particular phase of budget development. a blank space indicates a failure to participate in a budget task.

A = In preliminary discussion of developing draft budget

B = In discussions of projected future rate increases

C = In reviewing the draft budget before its approval

D = In reviewing the board approved budget before it is announced to the RAC/Exec Committee

E = In reviewing the board approved budget before it is announced to the Residents

N = Not at all

Type of Involvement	A	B	C	D	E	N
4 LARGE Above 300 Residents	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	
7 MEDIUM 250-300 Residents	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	1 1 1 1	N N
6 SMALL 250-300 Residents						N 1 N N
5 VERY SMALL 250-300 Residents	1					1 1 1