

Friends of the Village Newsletter

Volume 3, Issue 5

 Laguna Woods Village

May/June 2011

Who is Associa?

**COME AND FIND OUT ABOUT THE RELATIONSHIP OF
ASSOCIA TO PCM AND
HOW IT RELATES TO OUR VILLAGE**

**ASSOCIA IS SENDING AN EXECUTIVE VP TEAM TO ANSWER
QUESTIONS AND DISCUSS THE ROLE THEIR COMPANY PLAYS IN
OUR COMMUNITY.**

**THIS IS YOUR OPPORTUNITY TO ASK QUESTIONS.
IT'S AN IMPORTANT MEETING YOU WON'T WANT TO MISS!**

**THURSDAY, JUNE 2
CLUBHOUSE 5 – 6:30 PM**

**COME JOIN US AND LEARN WHAT IS IMPORTANT TO
MAINTAINING OUR HOMES AND KEEPING OUR VILLAGE AS GOOD
AS IT CAN BE WHILE KEEPING OUR FEES LOW**

ENJOY REFRESHMENTS WITH FRIENDS AFTER THE MEETING

www.friendsofthevillage.com

!!! NOTICE !!!
IMPORTANT CLUB CHANGES

GENERAL MEETINGS WILL NOW BE HELD ON THE FOLLOWING ALTERNATE MONTHS:

JUNE 26:30 PM CLUBHOUSE 5
AUGUST 256:30 PM CLUBHOUSE 1
OCTOBER 66:30 PM CLUBHOUSE 5
DECEMBER 1 ..6:30 PM CLUBHOUSE 5

MEMBERSHIP RENEWALS EFFECTIVE JUNE 1, 2011 WILL BE HALF PRICE AND WILL BE FOR THE PERIOD JUNE THROUGH DECEMBER 2011. MEMBERSHIPS STARTING JANUARY 1, 2012 WILL BE ON AN ANNUAL BASIS AND WILL COVER THE ENTIRE CALENDAR YEAR.

DUES FOR THE BALANCE OF 2011 WILL BE \$7.50 SINGLE AND \$10 DOUBLE.

You may renew at the June 2 meeting or send your check to Myra Norman, 3312 San Amadeo, Unit #C and mark it: "FOV Membership Renewal."

A form for new members may be found at www.friendsofthevillage.com



What is the Role of the Management Agreement?

by Marian Dailey

Left to right: Janet Price, Finance and Administration Director of Laguna Woods Village; Jim McNulty, former President of United who oversaw negotiations of its Management Agreement five years ago; Bob Hatch, former Third Director and current GRF Director who participated in negotiating the Third Management Agreement; and Moderator Marty Rubin.

A good time was had by all at the April FOV meeting where a panel of experts described what the management agreement is and what is required by both parties.

The discussion started with a short review of the history of the original governance of the Village, the need for independent, professional management and the formation of Professional Community Management (PCM).



A detailed recap of the discussion can be found at www.friendsofthevillage.com and the program will be replayed on TV6 on May 26 and June 8 at 2 p.m.

Lawsuit Update

Third Mutual Settles Lawsuit, Milt Johns' Cross-Complaint Against GRF/D. Disbro Dismissed, United Issues Investigation Report

by Mary Robertson

Lawsuits Settled/Dismissed

The contentious lawsuit filed by Third Mutual against PCM and its financial director Janet Price and past general manager Milt Johns has come to a close in a confidential settlement.

Because the settlement details remain unknown, more information about the terms and conditions of the settlement, including any potential monetary valuation, will not be known.

Third Mutual's Treasurer, Kathryn Freshley, stated that Third will receive some money; however, she declined to say how much or how it will be reported in the Mutual's financial records.

As a result of pre-trial motions, Milt Johns' cross-complaint against GRF and Donny Disbro was also dismissed, leaving him the right to re-file with greater specificity. More information on the status of Johns' cross-complaint will be provided as the case progresses.

United Releases Its Report on Incentive Plan

United Mutual released its report on its investigation into the PCM employees' incentive plan as a result of Third Mutual's lawsuit. United had hired attorney David F. Feingold to do the investigation.

As a result of his review, Feingold recommended United not join the Third Mutual lawsuit as it "would likely not be successful, be prohibitively expensive to prosecute in light of the potential gain, expose United to additional liability, have a negative impact on property values, and adversely impact the community."

United has now gone on record with GRF and Mutual 50 in declining to be part of Third Mutual's lawsuit. The full text of United's report can be found on our website, www.friendsofthevillage.com.

Planned PCM Actions in Response to Report

At United's May board meeting, PCM General Manager Jerry Storage explained the actions PCM has already taken on the issues that have caused contention in the community and outlined new actions they will be taking to help improve open communication and transparency between PCM, the boards and the community.

His complete statement is printed in the insert to the left.

PCM/Associa to Pay Part of United's Legal Costs

Gail McNulty, President of the United board, stated in an interview with TV6 that the total cost for the investigation will be around \$235,000.

At the May United board meeting, United Treasurer Heather Gerson said PCM and Associa, the holding company for PCM, have offered as a good faith gesture to provide financial help to offset United's costs for the investigation.

Future Actions

We will continue to report additional information as circumstances warrant – and as things begin to settle.

The issues raised by Third in its lawsuit and by United in its report, involving the appropriateness of the current contract and the degree to which information on employee bonuses could or should have been disclosed to the board and community, have not been resolved. These are matters

that can and will probably be addressed by the boards in their forthcoming contract and budget efforts.

PCM Promises More Openness on Employee Bonuses

At the May 10, 2011 United board meeting, PCM general manager Jerry Storage provided the following statement in response to United's report on its investigation into the PCM incentive plan.

"The community has an opportunity to move forward in a positive direction after having experienced some very difficult times over the past year. And this applies to PCM as well. The Third Mutual lawsuit has been settled and United, as well as GRF and Mutual 50, have completed their investigations into the former incentive plan. The findings of United, GRF and Mutual 50 have been published and PCM applauds the investigative efforts that were conducted.

"So what is the takeaway from these investigative findings? The need for more open communication and transparency between the boards, PCM and the community. PCM has already begun instituting measures in this regard.

"PCM eliminated the incentive plan in 2007 and there is no intent to reinstate it.

"There was concern over the use of GRF credit cards and that has been investigated by GRF with the number of credit cards diminished to two to be used for the purchase of certain materials and supplies, paying for board lunches and for expenses related to training.

"There has been concern raised over discretionary bonuses given to those employees who have gone above and beyond in their service to the community. Measures have been implemented to ensure that no bonuses are given without the boards first reviewing the aggregate bonus amount recommended by management and the criteria upon which bonuses are recommended.

"It is my promise as general manager to ensure open communication and transparency and to work with each board to maintain positive working relationships. As I have said many times, PCM loves this community and appreciates the opportunity to serve you. We have a long history and institutional knowledge in the operation of the Village and we are dedicated to making our service to you even better. Thanks to the community and its support of PCM throughout the years and we look forward to an open, transparent and healthy relationship for the future."

News Alert

Red Curbs to Be Eliminated in Third Mutual

by Mary Robertson

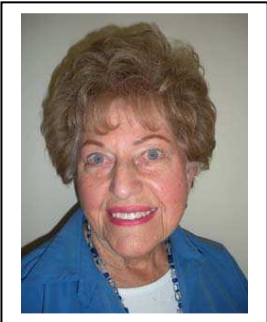
Over the past year, curbs in some of the cul de sacs have been painted red based on an assumption that this was a requirement of the fire department. Current State fire safety law requires wider lanes than currently exist in the cul de sacs. This has caused the loss of dearly needed parking space.

At the May 17, 2011 Third Mutual board meeting, Leslie Keane, Laguna Woods City Manager, advised the State law governing the wider lanes does not apply to our Village as it was developed prior to the new law. She also stated she has not heard that the fire department is having any difficulty negotiating the streets in the Village.

Third Mutual immediately agreed to eliminate the parking restrictions in the cul de sacs where the curbs were painted red due to this misunderstanding.

President's Message

by Maxine McIntosh



Many of us are well aware of most of the amenities available for our personal enjoyment in the Village. There is a rich mix of club, sport and organized entertainment available to all 18,000 of us.

There is even another layer of entertainment activities for all of us based on the excellent location of Laguna Woods

Village in Orange County. When the first phases were constructed in the 60s, this site was considered by many to be out on the fringe of civilization.

Because of the excellent location of Laguna Woods Village we have many choices of day trips within easy reach. In less than 90 minutes residents can drive to Balboa Park in San Diego or the world-famous Museum of Natural History in Exposition Park, Los Angeles. A trip from here to Grauman's Chinese Theatre, in Hollywood, involves few turns. Take the 5 Freeway onto the Hollywood Freeway. Exit Hollywood Blvd. Turn left and drive about one mile. You're there!

Twenty to thirty-minute drives from here include Los Rios Historical District near the mission in San Juan Capistrano. Tucked out of sight is a very new, large, and beautiful park devoid of any grass. My little granddaughters love to play there. There is also a very nice Victorian Tea House on Los Rios Street.

In the other direction we can drive to the historical center of the city of Orange where the blocks near the Plaza (no it's not a "circle") are protected by the Historical Society. For walkers, the first block or two fanning out from the Plaza in all directions hold many delights.

There is an excellent Parisian Tea Room just a few steps from the plaza.

The charming, Victorian McCharles Tea House is located in the older section of Tustin across the street from the school district offices. There are some interesting and historical shops nearby.

Twenty minutes north on the 5 Freeway and a turn left on the Main Street exit quickly brings us to the excellent Bowers' Museum in Santa Ana. Its rotating exhibits rival those of museums in much larger cities. There are tons of entertainment and culture there.

I wonder if any of you readers have driven east on El Toro Road for 30 minutes or more. It's a nice drive and you can turn into Modjeska Canyon to visit the Bird Sanctuary. Small but well-managed, it's a hidden treat for all ages. Someday perhaps the community will be able to reopen Madame Modjeska's home to the public.

You don't want to drive outside the community? I met a Village resident some years ago, who managed to have many happy experiences outside our gates despite her necessity to follow a strict budget. She was a walker and told me she had given up driving to be certain that she could afford to live here. On rainy days she began taking the Village bus to the mall. There she met other budget-minded residents who walked with her. When they sat down for some coffee, they began making plans for nice weather outings. Four to six of them would meet at the OCTA stop by Gate Five. Receiving senior discounts, they would carry their lunches onto the bus which took them to the main beach in Laguna. They had many happy adventures there, always returning by 4 p.m.

Last year, five of my high school friends wanted to meet at the San Diego Train Station in order to browse an historical section of the city and have lunch with an old classmate who lived there. One friend boarded the AMTRAK in Anaheim, two got on in Orange, I met them at the Irvine station and we picked up the last friend in San Juan. What a wonderful visit we had along the way.

I feel that our Village location in Orange County is an intangible perk for all of us.



NEED A RIDE?

CALL THE "B" BUS if you need transportation to and from the FOV meetings. To arrange pickup, call 949-597-4659 before 3:30 p.m. the day of the event.

CAN'T HEAR THE SPEAKER at the meetings? Arrive a little early, go to the office and request an amplifier. Be sure to have your Village ID card with you.

A Week at the Equestrian Center

by Lynn Hamm

Last year, in his "Nooks and Crannies" column, Norm Salzberg wrote a great article about our Equestrian Center. This was most appropriate, because some residents don't even know where it's located, especially when you consider that the stable is one of the amenities that sets our Village apart from the vast majority of over-55 communities.

Actually the Equestrian Center was one of the reasons I moved to our Village. I'm still amazed that residents can drive for five minutes or less and be transported to a different world where everything slows down and where



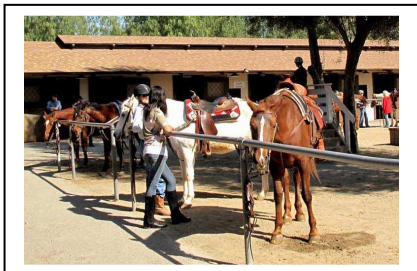
you can forget your concerns and revel in the beauty of the stable and horses. You don't have to own or ride a horse to enjoy this unique feature of our Village. Most

afternoons you can find June Butler, who goes around and visits all the horses, at the stables. June will be 97 in a few months! Even if you only have a few minutes, you can stop by the hospitality room, where "cowboy coffee" is always brewing.

The last week in April is a good example of Stable/Saddle Club activities where everyone was welcome:

On Saturday, April 23, the stable held its annual Easter Celebration. Hundreds of grandparents, parents and grandchildren

enjoyed a horse parade and Easter egg hunt, and then the children had fun riding ponies. The three ponies varied in size, so each child could be matched to the



appropriately sized pony. My favorite was the littlest, named "Rascal." It was so much fun seeing the happy smiles as the children hunted for Easter eggs and rode their "steeds."

On Thursday, April 28, Stable Supervisor Mike Settupane conducted a "Horse Camp." This is where residents who sign up are assigned a GRF horse, which they learn to groom from head to hoof. Not only is this a fun activity and some **good exercise**, but it's also a clever way to give the GRF horses an extra grooming. Remember, we all own the GRF horses. Speaking of Mike, he and his dedicated team do an amazing job of maintaining our beautiful Equestrian Center and caring for the horses, they are to be commended!

Then on Saturday, April 30, the Saddle Club held its seventh Annual Casino Night. This is an event that brings many people together. There were line dancers,

Baby Boomers, tennis, volleyball, bridge and cribbage players and even Mutual presidents. They danced to the music of the "Swing Shift," dined on a delicious dinner by Lombardi and gambled at tables provided by Dads Poker Night. Many people went home with great prizes.

So, please know you are encouraged to visit the stable, say Hi to the horses and have a cup of "cowboy coffee." If you are interested in taking a trail ride or lessons, they are available by reservation. To learn about future Equestrian Center activities, be sure to check the "Saddle Up" column in the Globe. In closing, horse owners love to talk about their horses; please feel free to ask questions when you visit.

MY COUNTRY

by Jan Marshall

www.authorhumoristjanmarshall.com

When I wrote this on the second day in May I realized it was an eventful, patriotic month thus far. The *other* news was that the water shortage seemed to have ebbed a bit. I have been involved with conservation and recycling, even fixing my old beau up with a good friend.

I also suggest to my current sweetie, on a daily basis, that we cut down on electricity:

"I'd better not cook.

"Let's go out to dinner.

"You understand, honey bunny, I am doing this for my country not only for conservation but to help the economy. Ya know, farmers, waiters, wine stewards and doggie bag providers need the work.

"It is the least I can do."

He is doing his part as well. Whenever I start to speak, on his very own, he removes the batteries from his hearing aids. What a guy!

Saving our planet is a family matter. My granddaughter has found an ingenious way of keeping water from flowing down the drain. She soaks anything that needs washing: pots, pans, sweaters and a poodle (formerly a Great Dane). We both agree that washing items *too* frequently depletes water, detergent and the precious time that she could be texting on her smart phone while I continue to try to figure how to turn mine on. She said soaking makes the dirt softer. I admit we *do* have the softest dirt in town.

My grandson deserves credit as well. With his infinite wisdom he knows not to take a bath until the health department issues a warning. Leave it to children to be in the *know*. While I was gently reminding him of the virtue of cleanliness, he instead, was thinking of the bigger picture - remaining sooty for his concern for *his* country. I am so proud.

Now that the water shortage is less of an issue compared to our many other earthly issues, I revised some of my previous list on Marshall household sacrifices.

OLD RULES

Brushing our upper teeth on Monday, Wednesday and Friday and the lower ones on alternate days: CANCELLED.

Scotch *with* water was not permitted during our service to our nation. Adults were required to drink straight from the bottle: CANCELLED.

I notice some of us still wish to do our part *a bit longer*.

There is only one edict still in place. That is the one requiring us to save water by "showering with a stranger." We have made some very good connections. We call them our "straight from the bottle" buddies, all of us proud to be Americans; all of us smelling *pretty good!*

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Program? You can donate a tribute to the Foundation on behalf of a special person or occasion and it will be personally acknowledged. You can name the Foundation as a beneficiary in your estate planning; donating securities may result in substantial tax benefits. We want you to know that your \$'s will ONLY go to your friends and neighbors.

Donating is even easier now – use your credit card on our website – www.lagunawoodsvillagefoundation.com – and continue to help your community.

Questions? - please call 949-268-2246 or email us at: thefoundation@comline.com. Donor envelopes are available on the wall by the front desk in the Community Center. **You may send your donations to P.O. BOX 3279, Laguna Woods Village, CA 92654-3279. Thank you very much.**

The Foundation of Laguna Woods Village

by Pat Wilkinson

The Foundation of Laguna Woods Village would like you to know that our present economy has created hardship for many Village residents, and we are the only organization that exclusively helps residents of the Village. Did you know that all donations to the Foundation go to assist Village residents, through Social Services, Meals on Wheels, the Adult Day Care Center and the Florence Sylvester Center Congregate Meals

EXTRA, EXTRA...GET YOUR NEWSLETTER
To receive your FOV newsletter by email, please contact maryrobertson@comline.com. Those without an email address can receive the newsletter by regular mail by paying the annual \$15 dues.

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