FULFILLING RETIREMENT DREAMS
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The First 25 Years
of
Leisure World, Laguna Hills

Dr. Tracy E. Strevey
and Associates

The Leisure World Historical Society
of Laguna Hills, California
1989
Fulfilling Retirement Dreams was written to serve four needs:
1) To provide history as a record of the past and as a guide to the future — especially for the residents of Leisure World, but for all interested people,
2) To help celebrate the 25th Anniversary of Leisure World, Laguna Hills, California — recognized as the largest self-governed retirement community in the world,
3) To help people everywhere, whether still at work or already retired, as they seek new ways to fulfill retirement dreams,
4) To better achieve effective communication with the world around us and to thus better assure the inflow of residents of the same high quality as those who have already made Leisure World what it has been and is today.

Completing this book has involved a large number of people but in one way or another has revolved around the editor-in-chief, Dr. Tracy E. Strevey. Dr. Strevey’s credentials include twenty-five years of teaching history at the Universities of Chicago, Wisconsin, Northwestern and Southern California. His credentials additionally include twenty years in academic administration as Vice President and Dean at the University of Southern California and Haile Selassie University in Ethiopia.

The Leisure World Historical Society of Laguna Hills, California, is pleased to have the assistance of the Glendale Federal Savings and Loan Association in sponsoring this book celebrating the 25th Anniversary of Leisure World.

Claire Still, President
Introduction

An introduction to this book is well set forth in a poem written by John J. Kassenbrook, former Treasurer of the Board of Directors. The poem well illustrates the quality of spirit and varied interests of those who reside in Leisure World, Laguna Hills.

LEISURE WORLD

This is written as you will see
About folks who have reached seniority
But as you read, this truth will unfold -
Not one of them is really old.
They are young in spirit and young in deed.
Each responds quickly, to a neighbor's need.
They play tennis, golf or ride.
They swim, and take any sport in stride.
Their dancing is a sight to see
For they out-do Terpsichore.
The Clubs they belong to — now one eight eight
Reflect their keen interest in country and state.
They create objects d'art, write stories and plays.
There are not enough hours in most of their days.
Is this where Utopia's flag is unfurled?
No! they're just happy folks, at Leisure World.

This book has been written and edited by a number of people under the sponsorship of the Leisure World Historical Society and the Glendale Federal Savings and Loan Association. It reflects the need for a community, be it town, city or a gated community like Leisure World to be conscious of its history and the role it plays in the wider area of human relationships, economic and political impacts. To know how a community began, to understand the growing pains of cooperative living and the maturing of ideas and concepts into a way of life is exciting and challenging.

It is a sad commentary to consider how much of our history as a nation and people has been lost through lack of foresight and leader-
ship in collecting and preserving those materials which properly used would provide understanding and insight into many of the problems we confront today.

Thus in conjunction with the 25th Anniversary of the founding of Leisure World, this book has been written. It is the work of many people. Each chapter has been researched and written by a resident of the community with one exception, namely, Dr. James A. Peterson, Director of the Emeritus Institute, University of Southern California.

These chapters were then edited and brought together in a cohesive whole by the Editorial Committee composed of Tracy E. Strevey, Victor Z. Brink and Eugene P. Conser.

Those who have contributed chapters for this book are as follows — Victor Z. Brink, Eugene P. Conser, Russell Disbro, Albert Hanson, Malcolm Heslip, Isabella Leland, James A. Peterson, Irene Puhlmann, Tracy E. Strevey, Martin M. Weitz, and Paul Zimmerman.

The colorful photographic cover picture of Leisure World and Saddleback mountain in the background is the work of Ace Aerial Photography of Laguna Hills. Pictures appearing through the book have been given to the Historical Society by Leisure World photographers Harry Ashe, Fred Braitsch, Bob Krips, Leon Schulze, Bill Shopp, James C. White and the Leisure World News.

In addition the committee is especially grateful to George A. Rowley, artist and cartoonist, for the various cartoons appearing in the book. Several of them first appeared in the journals published by this Historical Society during the early eighties.

Robert L. Price, a member of the Board of Directors and former Administrator of Leisure World, died in April, 1988. During his years in management Price accumulated vast quantities of historical data and materials which were turned over to the Historical Society. These have served to provide invaluable source material for this book.

In addition Blanche Miller, Secretary of the Society, Marjorie Brandon, former secretary to the Administrator, and the entire Board of Directors of the Historical Society are to be commended for their efforts in securing archival data and organizing official lists of documents.

The editorial committee is greatly indebted to a group of volunteer typists including Lydia Beale, Verlie Nolan and Eunice Wright. Their effort and skill made it possible to produce the typed manuscript basic to the production of this book.
The entire staff greatly appreciates the enthusiastic support given by Rex Perkins, Vice President of the Glendale Federal Savings and Loan Association in securing its financial sponsorship of the publication program. He was the key to securing the approval of the Glendale Federal in this entire matter and deserves our sincere thanks.

In conclusion it should be pointed out that the reader may notice some changes in style and format in each of the several chapters. Likewise there is some overlap and repetition here and there, but inevitable in this type of book. This is due largely to the fact that each chapter was researched and written by a different author, as noted above. Despite careful editing and minor revisions, these differences are apparent and add to rather than detract from the character of the book. These authors have been a part of the history of Leisure World and have contributed much to the evolution of a “Retirement Utopia”.

Tracy E. Strevey
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Leisure World Is Born

There Was a Dream

Back of every major accomplishment is most often a dream. And so it was with Leisure World. The dream was that of Ross Cortese — and it had to do with the way people would live when they retire from their regular work careers.

The heart of the dream was for retirees to have attractive housing quarters, to be near people of their own age, yet still to be independent of them, but to be free of the responsibilities of grounds and other exterior maintenance. There also would be clubhouses, golf courses, swimming pools, tennis courts, and other kinds of facilities — all to provide a great range of things to do to satisfy a wide range of needs and desires. There would be all the essential ingredients to make possible an active retirement at a quality level never before so fully realized.

Over the years it has been the desire of most individuals finishing their regular work years to somehow taper off and to do more and more of the things for which there had never before been adequate time. To some extent people have always, in one way or another, tried to achieve those objectives and to thus fulfill their retirement dreams.

But what was really new was that the size of the community would be very much larger so that there could be a previously unknown range of amenities and activities. The location would be climate-blessed Southern California and all of this would be available to the residents on a sound economic basis. This would be fulfilling retirement dreams on a scale that would provide new levels of accomplishment and satisfaction.

Having this dream was the starting point, but the job still had to be done. The land had to be found, financing worked out, facilities constructed, activities planned, and buyers attracted. Everything that was involved had to be put together in a total operation. All of this
was the challenge to Ross Cortese the business man, as well as to Ross Cortese the dreamer.

How Leisure World evolved and how it was accomplished is a story of a dream that goes back to the early years of Ross Cortese. It then weaves its way through the planning and construction of the first units of Leisure World, and on to September 10, 1964, when the first manor was occupied. And now on September 10, 1989 the dream has been in place for a quarter century. This book is about the past, present, and future of Cortese’s dream, and to how this all relates to the fulfillment of retirement dreams for Leisure Worlders and all people around the world.

Cortese — The Man Behind the Dream

Those passing along the San Diego freeway between Los Angeles and San Diego get a quick view of the thirty-two foot Rossmoor Unisphere on Avenida de la Carlota. A hasty glance tells them this is Leisure World, Laguna Hills, behind a wall amid a parklike profusion of trees. Inside there is little that identifies the man who created Leisure World. The only visible evidence of his touch is the family crest masoned in mosaic on the tower of Clubhouse 1. Beneath a centurion’s bronze battle helmet is a sky blue escutcheon. It is adorned with two silver pillars. Inscribed in script on the ribbon below is the name “Cortese”. The casual observer would miss it. Without ostentation, it poses as a single reminder of the man who accomplished the development of Leisure World.

Early residents will tell you about a dapper and energetic Ross W. Cortese hurrying thither and yon during the formative years of Leisure World, his helicopter standing on a pad near the Taj Mahal (then the corporate offices of the Rossmoor Corporation) awaiting his beck and call. Tracy Strevey, when he first met with Cortese at the University of Southern California, remembers his black hair, dark eyes, and speaking softly, fluently, and with great enthusiasm for what he proposed. Says Strevey: “I was impressed then, and have been many times since, by his ability to talk without notes, and how he quoted facts and figures, indicating an excellent memory”.

Cortese’s once jet black hair is now turning grey. But his dark eyes are still penetrating. He is the same sharply groomed man who was named one of the world’s best dressed men by the Association of Custom Tailors. This list put him in company with the likes of
Lawrence Olivier, Prince Rainier, Ronald Reagan, and Joe DiMaggio. Additionally, at the time of this writing, Cortese is again heavily involved with new projects in the health care area. He is a man who will never stop dreaming and doing.

In perspective, those who remember Cortese's accomplishments agree his name deserves far greater projection than the passing glance of those who chance to note his family crest embedded in the Clubhouse 1 tower. For it was Ross Cortese, of all the developers in the land, who envisioned the full picture of what a community of adults should be, and then put it together in Leisure World, Laguna Hills. Cortese is indeed the man behind the dream — a dream for which there is continuing fulfillment.

**Learning from Experience**

The birth and evolution of the dream came through experience and was closely tied to the story of Ross Cortese's early career. Cortese was born in East Palestine, Ohio but had come to California at an early age. At seventeen in his sophomore year at Glendale Hoover High he had become a dropout. According to Gene Wolfe, a prominent official in the Glendale school system — and later to become one of the early residents of Leisure World — the reasons were not ineptitude or shiftlessness, but simply to help put food on the family table. Wolfe also relates how Cortese was seen by him driving his small truck through the streets peddling fruit and vegetables door to door.

But now came a different opportunity. One of Cortese's produce customers — a Ben Weingard — owned a run down piece of property near Compton. The two men talked and Cortese agreed to see what he could do to make it marketable. Cortese repaired and painted the house and landscaped the lawn. Weingard then helped Cortese finance the purchase of a piece of income property in Culver City. Here the first seeds were planted to spark Cortese's interest in building, and of the kind of building that had to do with housing.

Next came a major development in Downey. Soon thereafter Cortese built a 200 home tract at Studebaker and Spring Streets in Lakewood. This was followed by a similar development at Lincoln and Gilbert in Anaheim. The purchase of 1200 acres, a much larger tract in Los Alamitos, followed. He sold the first houses there in 1957. Eventually he sold 3472 dwellings there with an average price...
of $13,000, resulting in a multi-million dollar profit.

First the new project was known as the “Walled City of Rossmoor”. (Rossmoor as a name combines the “Ross” of Ross Cortese with “moor” which is the Scottish for land. This name was also used for the corporation formed by Cortese). A highly desirable residential community, it is now called Rossmoor City. Completed in 1960, it gave Cortese such a financial thrust that he formed the Rossmoor Corporation and then went public with an offering of one million shares.

Cortese the builder was now emerging in full flower. His primary interest was in the direction of residences and over time he would build over 30,000 of them. Additionally, also, he would develop over a million square feet of commercial buildings specially designed for financial institutions, medical offices, restaurants, and service-oriented businesses. There would also be awards recognizing him as one of the top builders in the nation including, “Builder of the Year” by the National Association of Home Builders, the “Award of Merit” by House and Home Magazine, “Medallion Builder of the Year” by the Edison Electric Institute, and the “National Award of Merit” by the National Electric Manufacturer’s Association.

Now the Cortese dream moved into still higher gear. Not too many miles from Rossmoor City, he acquired a tract of land in Seal Beach. Here the dream for a large retirement community was to take a still higher turn and to be the major testing ground for the final phase of retirement housing development — about twice the size of Rossmoor City. Construction at Seal Beach started in 1960 and there were to be 6480 manors. At risk was all of the money Cortese had made on his Walled City of Rossmoor for a new theory of an adult retirement community. The first day of sales at Seal Beach was October 18, 1961 and the public response was so good that the project was to be sold out in two and one half years. The validity of the dream was now firmly established.

While the first residents were still moving in at Seal Beach in June of 1962, Cortese was casting searching eyes across America for other suitable sites for adult communities. One of these sites was at Walnut Creek — near San Francisco — where the Stanley Dollar estate was purchased. Not far from Princeton in New Jersey, 2600 acres of land were also acquired. Yet another 1000 acres were purchased near Silver Spring, Maryland — just 15 miles from Washington, D.C. Now also, Cortese identified about 3000 acres
of the Moulton Ranch located in the Saddleback Valley about six miles inland from Laguna Beach. Cortese’s dream had now sparked the major focus on what was to become Leisure World — the ‘Jewel in the Crown’ of his retirement housing developments.

Developing the Concept

The dream that found real expression in the Seal Beach project, and which fully evolved in the form of Leisure World, began as earlier noted, with the early thinking of Ross Cortese but the manner in which it evolved is particularly interesting. The building of the Wall-ed City of Rossmoor at Los Alamitos had led Cortese to think of the need for more medical facilities than already existed in nearby Long Beach. At this point Cortese thought seriously about building a new hospital there, to be run by the Catholic nuns at the church of which Cortese was a member. This hospital was, however, seen by the Long Beach medical people as something of a competitive threat and there was enough opposition that Cortese eventually abandoned that particular idea.

Meanwhile, however, his contacts with the late James Francis Cardinal MacIntyre, when his eminence was still an Archbishop, had borne fruit in other ways. The discussions with him about the hospital had now sparked a greater interest in the elderly and about how their retirement living might be better related to needed medical care. Now the Archbishop was so interested that he personally arranged a series of meetings to which a variety of interested friends, associates and specialists were invited.

Ross Cortese in an interview with the editors of this book tells especially how those meetings brought him in contact with Lewis M. Letson, a hospital administrator from Santa Ana, and how Letson’s practical knowledge helped Cortese shift his focus from hospitals to more health oriented retirement housing. Here too was some of the thinking that led to the early efforts at both Seal Beach and Leisure World to provide some aspects of medical support. Letson himself also soon joined forces with Cortese and was later to serve as the first administrator of the Cortese facility at Seal Beach.

In an interview published in the Los Angeles Examiner, October 8, 1961, Cortese explained the thinking behind what was to become the first adult community in Seal Beach:

“For years I watched the statistics of a snowballing elderly popula-
tion. I assumed someone would launch a major housing program for this group, but nobody did. I began ruminating about the kind of housing I felt elders would enjoy. I had the theory that older people want to own their own quarters and live independently, yet, they want to be near their own age group and they want to be spared maintenance details.”

He went on to say:

“l want to supply the basic needs of life for people aged 52 and older, create a serene atmosphere of beauty and provide security, recreation, and religious facilities — then leave the living to the individual.”

It is clear that Cortese did not arrive at his dream about a new kind of retirement living by chance. All of the contacts that he made would later be referred to by him as “shoemaker research”. And all of his thinking would be coming together in his plans for the new really big one, “Seal Beach”. This planning and the experience of the Seal Beach project would then spark the still larger dream. In total, the Seal Beach project would provide the foundation for the planning and development of our own Leisure World.

The Collaboration with USC

The success of Seal Beach, as we have seen, now brought Ross Cortese to a new and higher level of thinking. He was now ready to think of applying his adult retirement community concept in a more extensive manner — both in California and elsewhere in the United States. And as previously noted he had acquired an option on some 3000 acres of dry range land belonging to the Moulton Ranch. Now, quite properly, Cortese felt that he should have better information about people who plan to retire.

Cortese’s search for information now led him to the University of Southern California and to the office of President Norman Topping. Tracy Strevey, who was then Vice-President for Academic Affairs recalls a warm fall day when he received a call from Topping to come to his office to meet with two individuals who had an interesting proposal. One of the two men was Ross Cortese. The proposal was that the University do a research study for him about what older people wanted — their needs, hopes, and plans, the kind of environment they would want, the type of social activities and hobbies they would be interested in, and above all, their health needs
and medical requirements. There would be at the same time a new opportunity for USC to expand its own academic coverage of problems relating to the aging.

Cortese also stated that if the University would make a study and provide the information he needed, that he would give the University $50 for each unit sold for the purpose of establishing a program in the study of aging and older people — namely, Gerontology. The offer was accepted and another hour was spent discussing the scope of the research.

The University initiated the study and, for almost a year, teams of researchers covered all aspects of the factors involved in the retirement picture. The completed work was turned over to Cortese and it became a part of his program for Leisure World and elsewhere. At the same time the University was gathering data for its own research program which interfaced and overlapped with Cortese's needs. What has emerged has been a continuing relationship with the University of Southern California that identifies common interests in the areas of gerontology — a relationship that has carried on through the entire quarter century of Leisure World's history. The participation of Dr. James A. Peterson, head of the Emeritus Institute located in the Andrus Gerontology Center at the University of Southern California, is continuing proof of that close relationship.

Finding the Land

When the Seal Beach launching in 1962 provided tangible proof of the durability of the Cortese retirement community concept, Cortese as we have seen, looked to Southern Orange County where major new growth was to be expected. As previously noted also, Cortese had personally viewed this area by jeep and helicopter and had identified about 3000 acres of the Moulton Ranch — land then devoted largely to dry farming and cattle grazing, except for scattered ranch dwellings and barns. He saw this land as being especially well suited for a retirement community development and ideally situated next to the freeway system. Here indeed was an ideal area — about halfway between Los Angeles and San Diego, only a few miles from the Pacific Ocean, looking eastward to the Saddleback mountain range and next to the newly completed Interstate 5 highway. Subsequently Cortese went on to negotiate the purchase
of about 3500 acres of this land at a price of $2300 per acre. Of this purchase two plots of about 600 acres each were later sold off, leaving the remainder for the development of the Leisure World community and its shopping areas.

The big problem, however, was that this land had no sanitation or water — a problem that had not existed at Seal Beach. Orange County, at that time, did not have a planned community zoning ordinance and so it was necessary to turn to the City of Santa Ana for such an authority — where also there was water and sewage capacity. The plan was to create a strip of land along the Santa Ana Freeway which would join Leisure World. This was an approach frequently employed when a city wanted to join with an area then not directly adjacent to it. At first the City of Santa Ana was quite receptive to the idea, but when the Marine Corps protested about the impact of this plan on their operations at the El Toro marine base — to be discussed later in more detail — the city denied Cortese’s application. Fortunately, however, the County of Orange subsequently developed a community zoning ordinance and the Rossmoor Corporation filed the first application.

To provide water Rossmoor then set up the Rossmoor Water Company — later to be known as the El Toro Water District and also to be discussed later in more detail. A second company — Rossmoor Santitation, Incorporated was also formed. This company disposes of sludge and reclaims water. Both the water and sanitation companies also serve certain areas adjacent to Leisure World. This extended coverage outside Leisure World has — and still does — create problems when capital expenditures by the Water Company are needed for reclaiming water to meet Leisure World’s special requirements for its golf course.

Finding Financing

Like most everything that happens in life, there must be proper financing. A community like Leisure World requires financing in two different but related ways. There is first the risk capital required to purchase the land, develop it, construct the facilities, and keep all of this intact until the units can be sold to individual retirees. The second kind of financing is for the retirees themselves when they make their purchases. The first type of financing in the case of Leisure World involved a number of banks — especially now First
Interstate — and other lenders, like the Metropolitan Life Insurance Company. It is estimated that the “up front” risk capital amounted to some $15,000,000 before the first unit was sold. These risk capital stakes then of course continued as more portions of Leisure World were completed and clubhouses, golf courses, and other recreational facilities were constructed — always only partially offset by sales of individual manors.

The second type of financing — the loans to the individual buyers is the story of the early relationships with the Federal Housing Agency (FHA) of the United States Government. The FHA had been created as a part of Section 213 of the National Housing Act — a piece of legislation which coincided with the launching of Seal Beach. It has been said that the paperwork for the Seal Beach development alone amounted to a stack of documents 13 1/2 feet high — all of this being the foundation for loans of $75,000,000. The Seal Beach experience then again provided the model for a similar application for the Leisure World project.

The FHA financing at the rate 5 1/2% made it possible to market the first 6300 manors in Leisure World. But as time went on the rising interest rates in the general market would make the governmental fixed rate of 5 1/2% increasing burdensome to the developer. It would become necessary to find a new solution to the program through the condominium approach. The FHA financing will be discussed later in greater detail, but is noted here as one of the problems that had to be at least partially resolved before Leisure World could be born.

Relating the Dream to the Marine Corps

The birth of Leisure World and the dream that it activated, involves a long story of issues that had to be negotiated — and which are still today being further negotiated — with the Marine Corps. That story begins with the earlier construction of the El Toro Marine Corps Base at El Toro and the related impact on adjacent areas as planes come in for landing at the base itself. Here was a new housing development which in significant ways would interfere with the Marine Corps’ mission.

It was thus inevitable that when the Rossmoor Corporation first approached the City of Santa Ana and later when filing its two applications — one to the County of Orange for the needed zoning
and one to the FHA for its mortgage financing — that they were immediately opposed by the Marine Corps. This opposition was sufficiently effective that both the County and FHA were persuaded to withhold approval. Now took place an intensive effort between the Marine Corps and Cortese. On the one side was the Marine Corps endeavoring to prevent zoning and financing for the construction of Leisure World. On the other side was Cortese with his land and plans to build Leisure World. Also taking up the cause for Cortese was the Santa Ana newspaper, “The Register” then edited by James Dean.

It became increasingly clear that some sort of a negotiated agreement had to be reached between the two contestants — Cortese and the Marines — as to how Leisure World and the adjacent acreage might be developed. What followed was a series of hearings and meetings with Colonel Carlson, the Assistant Chief of Staff at El Toro, orchestrating the opposition and Ross Cortese seeking a solution that would enable him to get his applications approved, and to proceed with the actual construction of Leisure World.

The first conclusion of the two-way negotiation was that a permanent 2000 feet wide green belt under the ground control approach could be used only for recreational facilities, including clubhouses, and light commercial activities. This concession by Cortese provided the basis for the approval on February 14, 1963 of needed zoning by the County. However, the Navy Department now put further pressure on the FHA, and in order to get the needed clearance for the mortgage insurance, a more restrictive “Documents of Restrictions” was agreed to by Rossmoor and filed with the Orange County recorder on March 19, 1963. This new document spelled out in more detail the exact number of people who might populate given portions of the greenbelt area. Cortese was now at last ready to go forward with his plans for developing Leisure World.

Later Cortese was to have second thoughts about the restrictions he had agreed to, and he filed suit against the Marine Corps, claiming undue harassment in connection with the earlier mentioned restrictions. After hearing considerable evidence to that effect the Court was sufficiently convinced to award Rossmoor damages of $2.7 million, which with interest accrued came to about $4.2 million. In still later years the adequacy of these damages and the extent of the restrictions themselves has been further challenged by Cortese. While today new agreements have tentatively been negotiated
Cowboys herding cattle on the Moulton Ranch (below) was a scene that could have greeted Ross Cortese as he sought a site for Leisure World, supplanting later (above) by the Rossmoor Globe on its fountain base and the Cortese crest on Clubhouse I.
some questions still exist.

The relationship between the Marine Corps and Leisure World itself during the entire quarter century has been relatively friendly — each party recognizing the needs of the other and trying to find the best possible solution to problems of noise and safety for Leisure World residents. Also in recent years a new issue has emerged — as to whether the El Toro base might be additionally used for commercial purposes and thus relieve the pressure of massive county growth at the John Wayne airport in nearby Costa Mesa. On this issue Leisure World and the Marine Corps have come to work together as close partners united by a common cause to keep the base exclusively for military purposes. Leisure Worlders of course would like to be free of noise from both military and commercial aircraft, but they know that they made their original purchase with full knowledge of the military use. And now in company with other regional owners, they see the extension of the El Toro base to commercial use as an unacceptable worsening of noisy skies.

Cortese in Perspective

We saw earlier in this chapter how Cortese moved from an initial small remodeling project into the larger dream of planning and building Leisure World. We saw also some of the problems with which he dealt in the larger legal, financial, and political world. It may be useful, however, as we now come to the close of this first chapter, and to the actual move-in day at Leisure World, that we look at the man Cortese in overall perspective. Here is a man who has been both highly praised and bitterly condemned. How then can we bring it all together and see the man in perspective?

We can begin by noting the first key dimension which would surely be to see Cortese as the professional builder — both as a basic doer and as a manager of the many other individuals who must participate in such building activities. Here also what seems to stand out is the blend of building know-how with the humanitarian and the artist. In the latter area there is the Cortese who can sense that retirement manors can be built and grouped together with charm and good appearance for more broadly based resident satisfaction.

A second key dimension is certainly Cortese as the businessman — the businessman who thinks as an entrepreneur and who wants to make a profit. This certainly is consistent with the free enter-
prise system that is so basic in America.

A third dimension can perhaps be said to be the churchman and humanitarian. Cortese in direct conversations does not claim to be a good or even acceptable churchman, but he does wear the Catholic cross and one cannot fail to sense that there is at least respectable substance in this area. A part of this side of Ross Cortese is that one also senses something of a special feeling about older people, their needs and the kinds of problems they must deal with.

A fourth dimension also comes through as Cortese the fighter. Clearly Cortese is a man who likes to win and he is willing to expend the time and effort over time to outlast his opponents and to win — even if there must be compromise — at least in part.

Other dimensions are more subjective, but nonetheless discernible. There is the man who takes pride in what he has achieved, the man who can occasionally yield to anger and be determined in his denunciation of his opponents. And there is also the Cortese the dreamer who will never stop dreaming and planning. Certainly Cortese has been and will remain controversial. We seek only to find a fair and balanced position.

Probably the right perspective is to focus on Cortese in terms of the overall debt we owe him as Leisure Worlders. And so, whatever one's individual evaluations may be of the various dimensions we have outlined, and whatever our total overall judgement may be, we can find common ground in saying that here is a man who has left his mark, and that his dream about Leisure World has been something that all of us in some way have shared as beneficiaries. We are at least grateful that Leisure World did actually come to pass and that it is now here for all of us to enjoy and to be a part of now — today.

The Dream Arrives

As we have seen, the approval for zoning by Orange County on February 14, 1963, had made it possible for construction of Leisure World to begin — all to be dealt with in more detail in the next chapter. Soon thereafter marketing plans were then developed and activated. When the first sales were made the responses — 530 units — were beyond the expectations of both Rossmoor and the financial institutions that had supported Cortese. Meanwhile plans were readied for receiving the new owners and on September 10,
1964, Leisure World received its first ten new residents. The moving vans were parked on the shoulder of the then two-lane El Toro Road as these new residents impatiently awaited the ribbon cutting ceremony to start unloading.

Nate Willner, one of the original nine men on the security force and who still serves on the force at headquarters, was the officer who opened the gates on that memorable day in September 1964 and allowed the first moving vans to enter Leisure World. He recalls how the vans were lined up on El Toro Road, the confusion and excitement pursuant to the gates swinging wide and the joy of the people who became the first residents.

On hand also was Robert L. Price, who had come down from Walnut Creek to observe the opening of this kind of an operation. In this way Price would then be able to better guide Cortese’s Walnut Creek project when it would open later in the month. However, on November 23rd, Price was to come to work here and to be at the center of Leisure World’s management for most of the next twenty-five years. So here was the first introduction of a man who was to be deeply involved with Leisure World life over such a long period of years, and to be loved and admired by so many Leisure Worlders.

Yet to come was more construction, more sales, and more experience. Fortunately the months at Seal Beach had identified many of the kinds of problems that would need to be dealt with — even though there would be new conditions and new problems. Fortunately also, the people who were attracted to Leisure World were of the quality that would enable them to develop the activities that would make life here so rewarding. Leisure World had now really been born. The subsequent 25 years were to bring the new dream to greater maturity. But now the dream that had evolved over the earlier years had a definitive beginning. Now there were people who were embarking on a new phase of their continuing effort to fulfill retirement dreams.
Building A New Community

The Planning Begins

As indicated in the first chapter, the concept and early planning for Leisure World was the result of many factors. All of these came together as plans were translated into actual construction, backed by "front" money and then solid financing. The Federal Housing Administration gave both support and direction to the project and it was soon evident that Leisure World would become the flagship of all Leisure Worlds built across the United States.

There were many questions to be answered. How would the project be financed — how many manors could be built upon the property — how large should they be, where to place the golf course, what should be done to provide hobby facilities, how about entertainment? What commercial area should be planned — banks, restaurants, swimming, tennis, lawn bowling and shuffleboard? This is to name only a few of the things that needed to be considered to provide the lifestyle that Mr. Cortese dreamed of in connection with his projected retirement community.

Those were the basic entities that would be demanded by the residents, but how about the nuts and bolts such as water, sewer, electricity, gas, streets, TV cable system, storm drains and sidewalks. The Leisure World residents would also need to walk for exercise. Therefore, inside the walls there should be ample sidewalks, not only on the streets, but through the manors, near the golf course and outside the walls to the various shopping areas.

No community would be complete without houses of worship. Space was made available on El Toro and Moulton Parkway for any organized group to purchase land or receive it as a gift upon which to build a synagogue or church.

Community needs were carefully researched not only by the Rossmoor staff, but also by the Rossmoor-Cortese Institute for the Study of Retirement and Aging at the University of Southern
California. The Institute was directed by Dr. James A. Peterson — to be followed by Dr. James E. Birren. Later the Institute was to become the Ethel Percy Andrus Gerontology Center, and is internationally recognized as the outstanding Institute for the Study of Aging in the world.

Early studies of what the retiree wanted in his retirement years indicated:

1. Location — climate was an important factor — access to stores — health center services are very important
2. Privacy — Freedom of noise from manor to manor
3. Near their family
4. Economic class — preferred neighbors of the same social-economic class
5. Religion — Not a factor as most preferred a mixture of religions
6. Transportation — Access to highways and shopping centers was an important factor. Bus access, while important in the older group (over 80) was not so important in the group below 80
7. Health facilities — Considered as very important
8. Friends — Not considered an important issue as they expected to make new friends

Now, what did the retiree of 1963 want for housing? Continued market research indicated that a one or two bath manor with closet space, living and dining areas, and full kitchen would be adequate. One must keep in mind that this planning was being done 25 years ago — retirement income was considerably lower than in 1989 and the world had a different conception of what retirement was like. While the Rossmoor Corporation provided covered space for one car, they never anticipated there would be a demand for two-car garages.
By now one can see that Leisure World Laguna Hills didn’t just happen. It was probably the most researched community in its time. It was to set a new standard for retirement communities with a guarded gate and a walled community having ample exercise opportunities, entertainment, access to stores, markets, banks, and services. With those standards to meet, the Rossmoor Corporation had its work cut out.

The Community Layout

Taking 2000 acres of rolling hills and converting it into a community of 21,000 people required months of planning. The El Toro Marine Corps Air Station exercised considerable influence on the planning of Leisure World. A safety zone 4000 feet wide was demanded by the Marines. In this area no permanent housing could be built. Commercial buildings could be built if there were no more than 25 permanent employees in any one building. This area, to be known as the Green Belt, would be the logical area to place the golf course and facilities. Moulton Parkway, a north-south access road divided the community as did El Toro Road, an east-west access. There were no other roads available at the time the community layout began. Therefore, the road system as known today was worked out by Rossmoor in conjunction with the Orange County Road Department. The layout of the road system adjoining Leisure World established the Leisure World boundaries. Now it was possible to lay out the interior streets and cul-de-sacs. Bear in mind that ample room and access had to be provided for emergency vehicles.

While the general layout of streets and gate locations was being worked out, the decision regarding utilities was being determined. The basic utilities to be used were already established by the Public Utilities Commission in that each utility was assigned its own territory. The utilities assigned to this portion of Orange County were:

- Gas — Southern California Gas Company
- Telephone — Pacific Bell
- Electricity — Southern California Edison
- Cable System — Owned by Leisure World
It was an easy decision to decide that all utilities be underground as Mr. Cortese wanted a beautiful community and he would not accept overhead telephone and electric lines.

It is to be noted that water and sewer companies were not listed in the previously listed group of utilities. There was a good reason for this since there were no water or sanitation districts surrounding Leisure World. The El Toro Water District existed, but it was a wholesaler of water to ranches. The district was not interested in the retail sale of water nor was it interested in this large residential area coming to Saddleback Valley. Eventually the district gave in to the Rossmoor Corporation and agreed to provide wholesale water to the newly established Rossmoor Water Company and the Rossmoor Sanitation Company. The determination and confidence of the Rossmoor Corporation people was best illustrated by their decision to establish their own water and sanitation companies. To additionally illustrate their advanced thinking, it was determined that the golf course would be irrigated by reclaimed water from the sanitation district.

Many may recall the use of water cannons to spray the effluent water over undeveloped land surrounding our community. The golf course is sprayed at night in order not to interfere with play during the daytime. Present laws provide that maintenance crews can only spray the effluent water on the golf course. Sanitation laws also prohibit spraying the effluent water adjacent to residences, gardens, and sidewalks. With water becoming increasingly scarce, no doubt pressure will increase to use more waste water for irrigation. Treatment will no doubt raise its cost to almost equal that of fresh water. Also, one must realize that ample discharge from the sewer system is available. Currently the domestic use of fresh water is greater than its use for irrigation.

The All-Electric Community

Should Leisure World use gas for heating, cooking and hot water, or would it be better for the community if it became all-electric? An extensive engineering study was made evaluating the two sources of energy.

No doubt we all have our favorite fuel source, but the evaluations not only included initial cost, operating cost, availability of the fuel and its limitations, but it also included such factors as safety
and cleanliness. After careful consideration electricity was selected to be the sole source of fuel in Leisure World, excepting the Towers and Mutuals 68 and 69 which used gas for heating and hot water.

Bear in mind that in 1963-64 when the various design criteria were set, electricity was a relatively cheap fuel. Initially the rate for electricity was .035 per kwh. In 1989 it is .07963 per kwh for the base usage .1214 per kwh for all usage exceeding the base rate.

The failure of the Public Utilities Commission to establish tariffs that recognize the problems of the all-electric home has resulted in rather high winter heating bills. To overcome the rate structure problems, many with central air conditioning systems have installed heat pumps for heating and cooling. This results in a substantial reduction in electrical charges.

Others have installed solar heat for hot water which is very effective under our climatic conditions. The state and federal governments, along with the Edison Company, have provided additional incentives if you install solar heat for hot water.

Ceiling Heat

All the cooperative manors and multi-story unit manors have electrical resistance wires in the ceiling for heating purposes. Each room has its own individual thermostat to control the temperature. This is a distinct advantage over the central heating/cooling unit that blows air through ducts to each room. One heats the entire manor with central unit air conditioning. The use of ceilings provided very even heat and it was considerably cleaner than any other system. Ceiling heat operates at a much lower temperature than gas and is absolutely noiseless. Maintenance cost of ceiling heated manors is negligible. The maintenance of ceiling heat usually is the fault of the resident who drills a hole in the ceiling to install a hook hanger to hang a lamp or other device. Almost always they drill through the resistance wires buried in the ceiling. Checking with the maintenance department eliminates this problem.

Air Conditioning

Laguna Hills provides an ideal summer and winter climate. Only two or three days per year does the temperature exceed 100°. Every summer one can count on twelve days where the temperature
exceeds $90^\circ$, and rarely does one find frost or freezing temperatures in the winter.

The manors are well insulated in the walls and ceiling which helps to reduce the heating and cooling needs. The beautiful thing about Laguna Hills is that during the summer it always cools off at night and in the winter it warms up during the day.

Most of the manors use the wall type air conditioners usually installed in the living dining areas. Some have installed wall units that are heat pumps for both cooking and heating. The later units with attached garages have central air conditioning systems.

The Edison Company and the state and federal governments provide cash and tax incentives if the residents change the central air conditioning to heat pump units in order to lower the electrical usage for heating and cooling. The heat pumps have been quite effective in lowering heating bills.

**Planning Continues**

It is hard for the layman to visualize what must be done before the designing and placement of the buildings on the property begins. Early studies indicated that a one bedroom, one bath unit of about 850 to 900 square feet would be adequate. However, it was the developer's belief that the retiree wanted two bedrooms, two bath units. He later was proven right as the demand was for larger manors having two and even three bedrooms with two baths.

Each time a new mutual was built, the same model would be slightly larger, perhaps rearranged and given a new name. This was because the Rossmoor Corporation continuously carried on marketing studies. The final 110 units built were the largest, having from 2300 to 2700 square feet.

A demand arose for apartments and to meet it the Garden Villas were developed, each containing 24 manors, recreation room and underground parking. The original mutual consisted of 3 buildings located on the golf course. They sold very rapidly so 3 more Garden Villa buildings were started. Then sales were flat; hence, construction of Garden Villas was stopped temporarily and work began in phase three. Later, construction resumed and several more “Villas” were built.

The placing of the buildings on the property was such that there would be a minimum of noise from nearby radios, TV's or conver-
sational disturbance when windows were open during late spring, summer and early fall. Buildings were spaced far enough apart to provide walkways, large grassy areas and room for sunlight to enter the manors. Great effort was made to avoid any multi-story buildings casting shadows on the single story units.

An abundance of trees was planted throughout the community, as well as bushes to surround the buildings at their base and along walkways. In fact, so many trees were planted that it became necessary to remove many because they were too close to the buildings, walkways or cul-de-sacs, thus causing root damage to the foundations or sidewalks.

Careful attention was paid to landscaping with many flowering trees, shrubs and ground covers. It was always an inspiring sight to drive by a new area one day, and then two days later drive by and over the dirt see thriving green grass. Sod was used extensively to provide that instant lush green look. Leisure World was to become the largest user of sod in Southern California.

Financing

A project the size of Leisure World Laguna Hills required millions of dollars in financing before the first dollar was returned to the Rossmoor Corporation. To obtain financing of that magnitude required many budget sessions, review of costs, and meetings with the financial people. It was Mr. Cortese’s reputation for honesty and fairness that enabled the construction financing to be obtained in record time. United California Bank, later to be known as First Interstate Bank, provided the construction financing. The mortgage financing was provided by Beverly Savings and Loan, Bank of Detroit, Great Western Savings and Loan and United California Bank. The interest rate was set at 5 1/4% for all mutuals, excepting mutual 21 where the interest rate was 6.9%.

All financing and construction for all co-ops was guaranteed by the Federal Housing Administration, thus assuring a low interest rate. FHA specifications and inspection applied to all co-ops. When the FHA title 213 was discontinued by Congress, the co-op concept was dropped and the manors were built under the condominium laws of California. Construction financing remained the same. Rossmoor arranged financing through Great Western, Glendale Federal, Home Savings and several other financial institutions. You
will be interested to know also that, when purchasing a condominium, approximately 63% of the purchasers paid cash and that this ratio has remained constant even with resales.

Construction progressed smoothly with few delays or strikes. However, costs continued to rise, particularly in the late seventies. Each new mutual would vary in size from 50 units up to 569. The age of each mutual was set by several things, such as:

- Rate of sales
- Ease of obtaining construction financing
- Popularity of models offered
- Weather

As mentioned before, when each new mutual was started the models were upgraded and enlarged slightly thus increasing the cost. Again these changes were made at the request of new potential buyers.

Clubhouse One was completed prior to the first residence move-ins. Clubhouse One was to be used for offices, pharmacy, medical director, post office and recreation. The first move-ins occurred on September 10, 1964 when 20 manors were ready for occupancy. You can imagine the confusion between 20 moving vans, construction workers’ cars, and delivery trucks.

Gate One was completed, as were the walls along El Toro toward Paseo de Valencia. It was the builder’s policy to build the wall as each manor was being built.

Early move-ins had some problems in that the nearest store was at the railroad tracks and El Toro Road. This was a very small country store and ill equipped to handle the additional business created by Leisure World move-ins. This had been anticipated and contracts had been let to build the first commercial center which was to be known as Alpha Beta Center. Alpha Beta opened March 17, 1965 just over 6 months after the first move-ins. It was the writer’s privilege to have attended the grand opening and I recall Mr. Haskell, President of Alpha Beta stating, “I don’t need parking stalls, I need bicycle racks.” Over 150 bicycles were piled all over the lot and a guard was brought in to watch over them. The next morning more bicycle
racks were delivered thereby eliminating a minor crisis. The Alpha Beta building also contained a barber and beauty shop, cleaner, liquor store, and donut shop when it opened.

Construction was also going on to build Rossmoor's planned World Headquarters later to be known as the "Taj Mahal." Likewise, in the planning was a medical clinic building for the use of Leisure World residents. At the time of opening of Leisure World Medicare did not exist. Mr. Cortese believed strongly in medical care for seniors; consequently the medical center was built. The regular monthly fee included a charge for medical service. The clinic opened in May 1965.

Clubhouse Two had its official opening on September 8, 1965, just one year after the official Leisure World opening. Each clubhouse had a large gathering area for banquets, dances, and in addition, had smaller rooms equipped with complete kitchens. These rooms were for entertaining in small groups or to serve as classrooms.

The golf course, along with the starter building, was complete and ready to receive the first move-ins in September 1964. The original golf course was 18 holes. However, the demand for golf increased so rapidly that steps had to be provided for more playing time — thus the decision to add 9 more holes of regulation golf, providing a full 27 hole course. It was opened for play in 1971 and it did help to relieve the 18 hole course as many were now only playing nine holes. As Phase Three was developed without the lake and with a 9 hole executive course, the combination of all the courses provided ample space for play.

Planning changed as market conditions set new standards and needs. Likewise, the Golden Rain Foundation Board began to inject themselves into the facilities planning. For example, in Phase Three a lake was planned with fingers allowing apartments to be built with water on both sides. Even apartments in the Towers were sold based on a lake view, but the Golden Rain Board was concerned about the care and maintenance of the lake and expressed their concerns to Rossmoor.

After considerable discussion, it was determined that a nine hole golf course would be substituted for the lake. Incidentally, the street that would run around the lake area was named Paseo del Lago, and even though the lake is not there, the name Paseo del Lago still remains. GRF did permit a small lake in the center of the golf course which provides a place for migrating ducks to land. A beautiful touch.
Clubhouse Three was to be a “U” shape building with a patio inside the “U”. Again, the GRF Board said we need a theatre where we can have plays, lectures, movies, concerts, etc. The residents were supportive of this concept, so the plans were revised to include an 840 seat multi-purpose facility. The actual cost of Clubhouse Three was $964,000.

It was Rossmoor’s initial plan to provide land, free of charge, to any established religious organization. The Catholic and Methodist churches were quick to take advantage of this generous offer and other church groups were to follow. Now we find every major religious group is represented within the Leisure World community.

While all the construction of buildings was going on within Leisure World, considerable activity was taking place outside the walls. Union Oil was the first gas station, opening in late 1964. In early 1965 Standard Oil opened a gas station directly across from the Union station.

In 1967 Mannings Coffeeshop and cafeteria was opened, much to everyone’s pleasure, as this became the first eating establishment adjacent to Leisure World. Later Delany’s was to build right in with Mannings to provide a better place for dining. Now the community was taking on the look that Mr. Cortese envisioned when he began the project. There were two gas stations with repair facilities, two churches underway, a market with small shops, a bank under construction, a savings and loan, a fire station under construction and more facilities being planned.

Construction had moved swiftly because rainfall had remained normal or slightly below normal. In early 1967, problems began. December 1966 brought 8.1” of rain. January 1967 added four more inches. February was dry, but along came March and April with 4 more inches of rain. Flood damage was severe in Aliso Creek. This brought construction delays, but they were up to schedule by the end of 1967 and continued on into 1968. It was a dry year with only 7” for the entire year.

Financing the Community

Clubhouse Four was to be different than all other clubhouses as it was to be for arts and crafts only, plus a swimming pool and bridge room. Beginning with Clubhouse Three, the Golden Rain Foundation assumed the responsibility for design and construction of all
common facilities.

It has been mentioned before that the Rossmoor Corporation planned their Leisure World communities very carefully. Commercial areas along with facilities were well planned. Provisions were made and the land was given for churches and synagogues that applied. They were located for easy access by the residents. Many other senior housing areas provided the same, but what made the Leisure World communities unique was the financing for the mutuals and the common facilities operated by the Golden Rain Foundation of Laguna Hills.

Many co-ops and condominium groups fail financially because adequate financing is not provided for. Originally, 15,000 manors were planned with only five clubhouses. The purchase of Clubhouse Six was not planned for in the original facilities agreement, but was purchased later.

Some new terms will emerge as we discuss the GRF and mutual financing.

The Pre-Am Fund

Each new sale of a manor included a contribution of $350 into the Pre-Amortization fund. The purpose of this fund was to provide additional operating funds to maintain the clubhouses and bus system. It was determined that it would be unfair to ask the earlier residents to pay the full cost of operating the clubhouses and bus system when they were being designed for use by the fully built-out community.

In preparation of the annual budget the withdrawal of funds from the Pre-Am fund was planned for in order to reduce the monthly carrying charges. When the community was fully built out, the Pre-Am fund was depleted and the full cost of the operation of all facilities was paid for out of carrying charges. At that point carrying charges had a jump which most residents did not understand.

Working Capital

Most communities of this type start out without working capital. Not in Leisure world. The mutual corporation started out with $100 per manor contributed to the working capital. In other words, they had money to pay the early bills. Since the monthly assessment was due on the first, the mutual would have the funds to pay the
electrical, water and gardeners when payment was due. Most new condo mutuals did not provide for working capital, consequently they started off in the hole and remained so. However, not at Leisure World.

**New Equipment Fund**

It was realized at the beginning that new equipment such as lawn mowers, maintenance vehicles, buses, etc. would be constantly required and means had to be provided to accumulate the funds required. Thus, with every manor sold, $225 was contributed to the Golden Rain of Laguna Hills Corporate fund for the purchase of new equipment.

**The Golden Rain Trust Fund**

The trust fund holds most of the common facilities in trust for the benefit of all residents of Leisure World. Again, a contribution of $700 per manor was made at the time of sale. This money was to be used for the building of all trust facilities. It was stated earlier the GRF had the responsibility to design, build and pay for all facilities beginning with Clubhouse Three. Clubhouse One was complete at the time of the first move-ins. Payment had been made from the Facilities Trust Fund.

Clubhouse Three design was changed as the residents wanted an auditorium for meetings, plays, movies, lectures, etc. as well as the meeting rooms with kitchens and other facilities. The cost of Clubhouse Three exceeded the funds available when the auditorium was built. The trust fund borrowed the necessary money to build the project from United California Bank. It was paid for at the rate of 63 cents per manor per month until paid off. It was not necessary to borrow funds to build Clubhouse Four and Five as they were built from available trust funds. The contributions to the trust were increased several times as the planned number of manors was gradually reduced from 15,000 to 12,736. Most of the reduction in manors came from the elimination in the planned number of multi-story buildings.

The remodeling of the warehouse, the new auto-truck maintenance facility and the new purchasing-engineering building were all built with trust funds.
Purchase Of The Golf Course

Originally the Rossmoor Corporation owned the golf course and leased it to the Golden Rain Foundation. The rental fees were fair, but it really wasn’t what the residents wanted. They wanted to own the golf course. In 1973 the golf course was purchased from the Rossmoor Corporation for $3,103,809, including the starter building, golf carts and equipment. Payment was made with cash and two loans.

Loan number one United California Bank — $1,900,000
Loan number two Rossmoor — $1,200,000

The Rossmoor loan was a second on the property and was unique in that payment would not begin until the UCB loan was paid off. Payment to Rossmoor was to be made from trust funds, as was UCB, only as they were received from new sales. That is the unique part of the loan agreement. Should the project be complete and not as many units built as planned in the purchase agreement, the note would be declared paid in full. This clearly indicated the sincerity of the Rossmoor Corporation and Mr. Cortese’s interest in Leisure World Laguna Hills.

The Leisure World 18 hole golf course was located in Phase Three where it had been originally planned to locate a lake running between the Garden Villa buildings. Funds were paid for from the sale of new manors at the rate of $250 to $360, depending upon the contribution rate which at that time ran from $1450 to $2900 per manor.

Other Purchases

Clubhouse Six was never considered as part of the clubhouse system at Laguna Hills. Actually it was part of a sales promotion plan to invite prospective purchasers to spend 3 days to a week living in the community. They lived in manors surrounding the north and west part of Clubhouse Six with breakfast, lunch or dinner served at the clubhouse. After the completion of the program the manors were sold, but the clubhouse remained. When offered to the GRF Board they turned it down. However, after several months of negotiations, the clubhouse was purchased for $190,000 including land, furnishings and buildings. It was a bargain and has proven to be the most popular party clubhouse for groups under 100. GRF Corporation funds were used to purchase Clubhouse Six.
The location of the first tennis courts gave players an inspiring view.
The land for the clubhouses was purchased by the trust at the rate of $75,000 per acre plus taxes, plus 7½% interest from the date of the 1971 agreement. This formula applied to all land that was purchased such as for garden center two, and the RV parking area number 2.

In the initial forming, the community felt the need of a library and in 1966 the first area set aside for library space was established. It was not until 1975 that construction was begun for a permanent library adjacent to the administration building. Money for the library came both from the corporate facilities fund, and from the new manors contribution to this fund of $400.

**Tennis Courts**

When Leisure World was started, tennis was not deemed to be the popular game it is today. Two courts were all that were available. The community facilities agreement called for more tennis courts; however, funds were not available to build them until 1980. One must remember that trust fund money came from new sale contributions. The tennis complex was a cooperative effort between the tennis club and the GRF Board. Central lighting for night play on two courts was included. The users of the courts at night pay an electrical charge. Some unusual situations occurred during the building of the project. All were brought about by the building inspectors who demanded changes not included in the original plan check.

The first demand was that the building had to be sprinkled even though it was just over 800 square feet. The next demand was that water for the fire sprinklers would have to come from Gate Seven, not from the line already installed from Moulton Parkway. The next demand was to install a sewage pump and pump sanitation discharger. But this time the GRF Board balked and refused to make the change. The matter was settled in our favor by the chief inspector. At that point no further demands to change the specifications were made and the project was completed. Mr. Cortese contributed $20,000 from his own pocket toward the tennis project.

**Clubhouse Five**

Clubhouse Five was built to solve the need for large gatherings
for dinners, dances, etc., along with a large swimming pool to accommodate the residents in the area. The architect for Clubhouse Five won a design award for his work.

Clubhouse Five involved the first attempt to use solar heating for the swimming pool. The use of this method of pool heating was a disaster because the pool cooled off too fast overnight, even with pool covers. In addition there were too many foggy mornings and hence no heat until the sun came out. The heating panels were also used as part of the clubhouse roof and they leaked badly.

In the end, the panels were removed, the proper roof installed and a boiler was used to fully heat the pool — whether rain, fog or brilliant sunshine.

Clubhouse Five could seat 500 at a sit-down dinner plus other classrooms, card room, billiard room, an attractive library and swim locker rooms. There was lacking one important feature and that was a covered entrance to the main dining room. A very attractive arrangement was then worked out and has proved to be very satisfactory.

Today as one looks around inside our walls, one observes all the wonderful facilities that exist and realizes that it was careful financial planning that made it all possible. The funds existed because they were planned for and the mutual and Golden Rain Boards maintained their integrity. The policy of the Boards has always been to maintain the manors, facilities, streets, sidewalks, and equipment in top condition. Another way to make this statement is to say that the objective of all boards is to maintain the property values of each resident.
In the two preceding chapters we have seen how the concept of Leisure World came to be, under the overall guidance of Ross Cortese, and then how it took on physical reality in the form of resident manors and other support facilities. Here on September 10, 1964, were then the first arrivals taking residence in the first manors and with the first service facilities. What happened on that day was, of course, only a beginning step in what became a continuing process — more new people, more new manors, and more supporting facilities. We need now, however, to pause and look at things the way they were in September, 1964. We need to look in perspective at the people and at their new way of life. The first of these questions — the people — will be viewed and interpreted through the research studies conducted by the University of Southern California, all of which will be dealt with later in this chapter. The new way of life question will be one that will be a continuing effort throughout the remainder of this book. It will be useful, however, at this point to look at that question in a preliminary manner.

The New Way Of Life

The new residents of Leisure World had come from many different places, had varying backgrounds and a wide range of capabilities. There was one thing, however, that most of them had in common. This common characteristic was that most of them had lived in homes where they had enjoyed a great deal of independence as to how their homes could relate to the outside world, and as to how the costs of supporting that independence would be provided. Now things were to be quite different. Now each individual found himself, or herself, in a community that had a more definitive character of conformity. Here now was a community where the cooperative spirit
was to be more strongly projected in a variety of ways. These ways could be classified differently. There is also, with any kind of classification some unavoidable overlap between the categories selected. But here is one approach.

1. A New Higher Level of Security. "Having Security" must always be a relative term and each situation will have its special strength and weaknesses. Moreover, every situation for practical purposes, can be violated safety-wise if the intruder has particular capabilities, the intent, and the patience. But a wall is a wall and it says something to the potential intruder — a something that helps to deter him. And, if the intruder insists, there is still the greater effort required on the part of the intruder — that is, there are more impediments. Hence the walls — plus the gates manned by security officers — are a distinct plus, and they were so regarded by the new residents in 1964. The area around Leisure World would later become more intensively developed and the walled approach for a community system would continue to grow in importance.

2. Freedom from Yard Responsibilities. Some incoming Leisure Worlders in 1964 had come from apartments and were already used to being free of yard responsibilities, including lawn and trees. And some in other ways had totally or completely enjoyed such freedom. But for many of the new residents the freedom from yard responsibilities was a new and glorious experience. Yards, of course, also often included flower beds of one kind or another. In this area the sharing of responsibilities with the community could be more flexible. That is, one could relax and let the Leisure World Landscape Department provide a type of treatment and continuing maintenance of its own choice, or — within reasonable limits — the resident could do his own thing. This personal freedom, of course, had some limits but extreme choices by a resident would be subject only to the very general rules of the community or to the views of neighbors. The freedom from yard responsibilities also in some cases meant the freedom from keeping walks and door entrances cleared of snow in the winter. In these cases the new freedom was all the more valued and appreciated.

3. Defined Conformity Standards for Manor Exteriors. Closely allied to the yard issues was the application of community rules for the exteriors of the resident manors, walls and roofs. When one had lived independently in one's own home there had normally been the freedom to add a room, elevate a roof, build a porch, put in
an extra window, and the like. Now, however, there were rules and standards to be complied with. At stake was the concern of the community with overall appearance and with controlling the extent of impact on other neighbors. Exterior housing arrangements very often involve controversial judgments both as to aesthetics and functional feasibility. In some cases the feelings can be very strong and the validity of the judgments must indeed be arbitrated by community governance — all via specially designed and administered procedures that are fair to all parties. What was new for many was the general fact that now there had to be a certain degree of conformity in place of the previously relatively unrestricted freedom.

4. Expanded Activity Options. For many incoming resident in 1964, the big change was the new range of options available in the way of educational and recreation facilities. Previously, typically, there had been fewer activities that were conveniently available. In many cases the activities really desired had either not been available or, if so, only when one traveled a considerable distance, and with considerable time and expense. In 1964 some of the Leisure World activities had just been put in place. Some were in various stages of construction, and others were just on the planning board. Later also new activities were to be conceived and then brought to actuality. But now, typically, for the new incomers there was a completely new world of expanded opportunities. Now one could stay inside when one liked, and to the extent one liked, or could also pick up and go someplace and do things. It was like a new world. Life could again be interesting and exciting.

5. New Travel Freedom. The previously discussed freedom from yard maintenance responsibilities often also went beyond the immediate benefits and generated another special type of freedom. Many people, like the new Leisure World residents in 1964, had always wanted to travel more — to go to the many new places which through their lifetimes had always sounded especially glamorous and interesting. There is a disease that most people have called one-itus — that is, the yearning to go somewhere or to see something at least once for oneself. It may be a particular country, city, or foreign site. There had, however, often been restrictions to the desired travel. Especially there had been the need to look after a home and yard. Perhaps one could not ever go to all the foreign places one desired but now at least there was greater freedom to do so.

6. Expanded Neighbor Relationships. Having good neighbors was not
necessarily a new experience for the new residents in 1964, but for many that had experienced busy lives, moved many times, or had been used to city apartment living, there was a new awareness and appreciation of having good neighbors. The range of that new more neighborly feeling was no doubt a combination of the physical layout of the Leisure World manors — a physical layout that had built-in neighbor contacts — and the time in life when people were not so absorbed with jobs, children and professional careers. All of the newcomers to a considerable extent shared the problems of the trauma of leaving established homes, a customary way of life, and the adjustment to a new and usually smaller residence, and a new life style. It was natural, therefore, that many new friendships and neighborly alliances should be formed on a day-to-day basis. Common problems do indeed generate good neighbor relationships and this was so much the experience of the new residents who began to flow into Leisure World on September 10th 1964 — and then to continue on through the later years. In a larger way this good neighbor experience also generated the concern for community welfare — the people — as opposed to a narrower concern for the individual or the special group.

7. The Shared Cost Concept. The experience and validity of sharing cost has in some respects been a part of the life of every individual. These experiences have come to us via churches, colleges, clubs, and special causes. Under conditions of separate living, however, this sharing has not involved so much our everyday living. Now, however, the living group has expanded. Instead of a single private home — whether very modest or very elegant — there is the fact of the larger group generating and sharing costs of the services generally needed or found enjoyable. The push in that direction is fueled both by the spirit of the good neighbor — as just described — and the problems which would be involved in sorting out specific costs, allocating them to the right beneficiaries and then actually collecting the then determined costs. Under the conditions existing in September 1964 — and the years following when the same conditions persisted — there was therefore a special momentum in the direction of sharing costs. It was not only practical, it was right, and there were more important problems and concerns to be dealt with. Moreover, this momentum has continued throughout the entire span of Leisure World’s 25 years and is still alive and healthy.
About the People

We have seen how the people who began to come to Leisure World on September 10, 1964 found a new way of life. We would now, however, like to come back to the people themselves and try better to understand them in more measured terms. Here we have many questions. Who were the people attracted to come to Leisure World? How did they decide about coming here? What considerations were involved? Did they find the things here they thought they wanted? Were the things they thought they wanted what they really wanted? How did these new residents settle in? And what were some of their earlier experiences that are worth remembering and of use to those now facing similar problems? Here we find good answers through the studies of the Gerontology Center of the University of Southern California. These studies came about as a part of an unusual relationship which began before the first move in on September 10, 1964 and which has continued throughout the entire quarter century of the life of Leisure World. We turn now to a closer focus on that unusual relationship and investigate the seminal relationships of the Rossmoor Cortese Institute for the Study of Retirement and Aging at the University of Southern California and Leisure World of Laguna Hills, California.

Working With The Gerontology Center

Leisure World has grown to be one of the largest and certainly one of the most successful retirement communities in the nation. The Gerontology Center at the University of Southern California is now the most comprehensive and respected center of research and training in aging in the world. These two innovative and promising institutions were profoundly linked during their early years. This report endeavors to trace some of the interaction between the two in their developing years which molded and patterned later growth for both institutions. There was one characteristic that marked both groups. They were both new in their history and their vision. There were few and only partial models before them, although they both became national models later. The developers of Leisure World needed to know much about the needs and motivation of the older population, while the gerontology center needed to focus on the fields of inquiry which would contribute to the infant field
of Gerontological Science. Leisure World viewed the demographic revolution as furnishing an unparalleled client opportunity. The Gerontology Center felt a great motivation to begin to cope with the problems and opportunities exhibited by a burgeoning elder population. We shall explore the ways each contributed to the other in meeting those challenges.

The Initiation of the Relationship

There probably would never have been a Gerontology Center at the University of Southern California if it had not been for the imagination and organizational expertise of Ross Cortese. He made the original proposal that a Gerontology Center be established at the University of Southern California. The proposal was made to Dr. Norman Topping, the dynamic and responsive President of the University of Southern California. Dr. Topping asked that the matter be considered by a special committee that would report to him on its feasibility. Dr. Topping named Dr. James A. Peterson, the head of the Sociology Department, to head this committee. When Dr. Peterson asked Dr. Topping why he should head the committee, Dr. Topping replied that he was the only one on campus that had even taught a class in aging. Dr. Peterson assembled a committee representing the major disciplines that would be involved if such a Center was initiated. Included on the committee were several Administrative Vice-Presidents, including Dr. Tracy Strevey who was then Academic Vice-President of the University and who is the editor in chief of this book. The committee met weekly for three months and finally at a memorable luncheon made a favorable report to the President, who then began negotiations with Ross Cortese for the inauguration of the Center.

The agreement reached in the negotiations between Cortese and Topping was positive. It provided for the funding of the Center in a unique way. Mr. Cortese would provide fifty dollars to the Center for each new home that was built in the various Leisure Worlds that were planned across the country. It provided a mechanism for the continual interaction between Leisure World and the Center. At no time did the agreement ever suggest that the financing of the Center would devolve on the residents of any of the retirement facilities. These were to be paid by Ross Cortese and his development group.
In the meantime an Executive Committee was formed by Dr. Peterson to outline strategy in the development of the Center. Some baseline rules were established:

1. The Center was to be interdisciplinary, embracing all the departments that had an interest in aging.
2. The Center was to have broad objectives; it would focus on research, on training and on community service.
3. The Center would have strong leadership; the committee set as one of its first tasks the securing of the best director it could find after a national search.

The Center went right to work and much of the remainder of the chapter spells out its work in its first two years. Its first task was to find a permanent director and Dr. Edward McDonald, Associate Dean of Liberal Arts, was chosen as the head of that committee. A basic research effort was also outlined to look at the motivations and characteristics of early in movers to Leisure World. Consultative services were established to Leisure World and a community educational process was initiated.

After interviewing gerontological leaders throughout the United States the final selection process resulted in the calling of Dr. James E. Birren, who was then head of the Child Development section of the National Institute of Health. Dr. Birren had already established himself as one of the leading researchers and administrators in the field of Aging. With his coming the real growth of the Center began. Dr. Birren then secured a million dollar grant from his former employer, the Institute of Health, which enabled the University to bring three other distinguished gerontologists to the staff of the University. The grant also provided for underwriting graduate students who were to complete their doctorates in various of different disciplines involved in the study of aging. He shifted the focus of financing to grant support and eventually to the Retired Persons Association which funded the present elegant headquarters of the Center. He has led the Center as it has become the leading research and training center in the world.

Yet the primal stimulus for the founding of the Gerontology Center came from Ross Cortese. He funded the first year including the first major research project of the Center which will be summarized later. He gave the University a vision of a new enterprise that has become one of the major educational and research centers on campus. He was a pioneer in many senses of the word.
Early Contributions of the Center to Leisure World.

The Golden Rain Foundation was the management group that supervised services at Leisure World in its early days. Leisure World is a cooperative and is self-directed. Each resident has purchased a home and with it a substantial vote in the determination of the rules by which Leisure World is governed and managed. The Golden Rain Foundation early on depended partially in its decision making on consultation with the Gerontology Center. An agenda for a 1965 meeting of the Executive Committee of the Center illustrates some of the ways in which the two institutions interacted in those early years:

I. Service of the Golden Rain Foundation

A. Preparation by the Director and Staff of a questionnaire to be used for the work of the Golden Rain Foundation

B. Preparation of lecture series for Seal Beach

C. Consultation with Channel 28 re: television programs on Aging

D. Continuous conferences with Mr. Cormsen re: Policies and Work for the Golden Rain Foundation

A second agenda from May 14, 1965, at a meeting of the Leisure World Staff with relevant staff from the Ross Cortese Institute, throws further light on the type of interaction which characterized work in those early years.

AGENDA

1. Approval of Agenda

2. Discussion of Presentation

   A. Film strip presentation of Seal Beach Leisure World residents as industrial consultants with consideration of questions for the Extension Division of the University.
3. Presentation of certain research materials by Dr. James A. Peterson

A. At the last meeting of this group, Mr. William Simon raised certain questions regarding the characteristics of the in-movers into Laguna Hills. This research material to be presented is relevant to answers to those questions.

4. Consultation regarding problems at Seal Beach.

A. This hour is to be devoted to a searching analysis of the conflict at Seal Beach to try to understand basic aspects of the problem and to develop insights which may assist in the amelioration of these problems.

The report which Dr. Peterson gave at this meeting consisted of some fifty-seven pages of basic research into characteristics of California's older population and the preliminary results of the study of in-movers which he was conducting at that time. The analysis of some phases of the characteristics of older persons in California, the nature of in-migration in California, the apparent need for health care of our older citizens (the fact that only 14 percent of persons over 65 had any form of health insurance at all), the age trends in employment in the State as well as a growing tendency in the population to take early retirement. All of these factors were important to Leisure World in dealing with its potential clients. The specific finding of his study of the movers into Leisure World that concluded the report will be given under the section entitled Research. The reference to the conflict in Seal Beach is important in understanding the consultative nature of the early regulations of the institutions. The Leisure World of Laguna Hills and Seal Beach were both managed by the same managerial group. Much attention was paid by the Gerontology Center to both cities. At Seal Beach a profound conflict had developed between the new residents and management. The Cortese Institute served the function of gathering facts and assessing attitudes which were shared with management in an attempt to ameliorate the conflict. The outcome of this conflict was that Seal Beach, Leisure World eventually hired a new management group and continues to function as a successful retirement association.
The Early Education Efforts of the Cortese Center

Reference in the Agenda was made to the marshaling an educational series for Seal Beach. The same effort was made in Laguna Hills. Laguna Hills had an in-house television system which was available to all the early households in Leisure World. Dr. Peterson spoke by means of this media to the residents of Leisure World, as did Dr. Herbert DeVries and other personnel from U.S.C. Management, as staff were also invited by the University to participate in its early education efforts to the community. The first memorable occasion came in 1984 when two of the nation’s outstanding gerontologists, Dr. Marjorie Lowenthal of the University Medical School in San Francisco and Dr. Bernice Neugarten of the Human Development Committee at the University of Chicago, were invited to the University of Southern California to summarize their research and to consult on the research program of the Cortese Institute. This was the first public forum ever held on campus for the benefit of the community. It set a high standard for those that followed and initiated the commitment of the Gerontology Center to share its program with the community. Several members of the management staff of Leisure World, as well as many persons from the general community of Los Angeles, attended.

Dr. Herbert DeVries was mentioned above as participating in the education efforts of the in-service television programs at Laguna Hills, Leisure World. But, DeVries did far more than this, he established his own laboratory on the grounds of Leisure World just outside of the health building to conduct his experiments on the use of exercise to enhance physical health. His work over many years in the Laguna Hills complex made all Leisure World sensitive to health needs. His was an on-site educational program of great meaning. We shall speak of his research findings in another section.

Major Research Programs at Laguna Hills by the Cortese Institute

A. A Time for Work, A Time for Leisure

This is the title of the first major research project conducted by the Gerontology Center and it was done at Laguna Hills. The sample for the first study was drawn from the roster of the first two mortgages and was limited to persons moving to Laguna Hills from
Los Angeles and Orange County. As this study involved interviewing movers into Leisure World before they had moved it was impossible to contact those moving from greater distances. However, only 112 of 623 names originally drawn could not be interviewed for this reason. Eighty percent of the final panel of names were finally interviewed. One hundred individuals were lost, due to the refusals, moving, deaths or other causes. However, this is a refusal rate of only 11% and is not judged to be high for this type of study.

An examination of the in-moving population to Laguna Hills presents an overview of such a population. In many respects the findings present a pervasive anomaly of a heterogeneous community. For example, the ages of the in-movers do not correspond to the common image of a retirement community as about 39% of the respondents were less than 65 years of age, 45% were between the ages of 65 and 75, and approximately 1 percent were over age 75. The interviewed sample might be generally described as consisting of persons over middle age who do not have children or adolescents in their households. All of the family developmental cycles after child-launching are represented. Another distinctive characteristic of this retirement community is that it does not, as the name might suggest, appeal only to retired people. A closer investigation of the matter shows that only a third of this non-retired group was over the retirement age of 65.

The in-movers represented a wide variety of socio-economic groups. Although a much smaller number of individuals represent the lower class positions of skilled and semi-skilled workers, nevertheless about 12 percent of the study population of the once or presently in-movers were “Blue Collar” workers. As an indication of the imbalance toward a higher socio-economic end of the continuum is the high percentage of persons (26 percent) who were considered professional members of their community. A similar picture of educational achievements confirms the conclusion that this particular retirement community attracted its members from a diversified segment of the general population, but, again the better educated portion of the population had a much greater representation. The median education of the in-movers was twelve years, or a completed high school education, which compared to the nine years completed by persons in the United States who are 45 years or older.

Eighty-one percent of this group was presently married, 17 percent widowed, 2 percent divorced and 2 percent never married.
Within the unmarried segment of the in-moving population the women outnumbered men five to one. It was felt at the onset of this study that an examination of the different life levels of various groups would be valuable. Adjustment was measured by Havighurst's Life Adjustment Scale "B". The results of the analysis showed that 36 percent of the married individuals fell into the high adjustments group and 18 percent fell into the low adjustment group. Conversely, 21 percent of the non-married fell into the high adjustment group and some 32 percent into the low adjustment category. One result of single women moving into this community became obvious. They would have more immediate and permissible contact with many more men than if they were living in another setting.

A religious profile showed that the in-moving population was composed of 8.5 Catholic, 3.9 Jewish and a strong majority of 84 percent Protestant. Thirty-seven percent of this group claimed weekly attendance.

When the study tried to summarize a general picture of the in-moving group it concluded that in general they tended to be upper-middle class, but still there was a wide variety of social classes represented. There was a similar distribution of the population in age, education, religion, retirement status and morale. A second characteristic was found to be a contracting of life in various areas of participation. This is true of religion, organization participation and certainly in work. Some members of the group were quite specific about missing work participation. Approximately 15 percent of the retired group answered "often" to questions if the respondents "found difficulty in keeping occupied", "missed doing a good job", "wanted to go back to work", "missed people at work". There was certainly some distress over their role discontinuity consequent to retirement. Of those who were still working, 40 percent thought that retirement was good, but 30 percent thought of it as being bad for a person. Almost 40 percent of the entire group expressed some dissatisfaction from no longer being employed.

The expectation that moving into the retirement community would bring a new life was almost universal. The interviewees often used the most euphoric terms to express their hopes of a new and better way of living. In conducting group interviews with a number of these people the author was astonished at the awe and enthusiasm with which they regarded their coming new environment. There seemed to be something of a process of "idealization" going forward.
The particular problem that such a process brings to administration is that consequent disillusionment, no matter how unjustified, must bring in its wake frustration and sometimes aggression. The author urged the administration, because of this, to pay careful attention to selling procedures, orientation to the new community and help in early adjustment.

**MOTIVATION FOR MOVING**

Basic to understanding the in-movers were the push factors — why they wanted to leave their present housing arrangements and pull factors — the features of Leisure World that attracted them. The latter was based on their dissatisfaction with their old residence and the general deterioration of the community, growing invasion by minority groups, and climatic conditions such as high levels of hot or cold weather. Another general area of dissatisfaction centered around neighborhood problems such as too many and noisy children and adolescents, incompatible neighbors, or cherished neighbors, and friends who had either died or moved away. One can become isolated simply by staying a long time in one place! These types of responses accounted for 13 percent of total perceived reasons for moving.

A second major factor that attracted individuals to Leisure World was the need to be free of responsibilities in maintaining a home. Many felt that a home of size and stature formerly required to house a growing family could be desirably relocated by a much smaller residence with much less upkeep. Part of our understanding of what seemed to the in-movers as important factors in their decision to move was basic dissatisfaction with current housing, present neighborhoods, incompatible climate, too great responsibilities and a need for more freedom. In a sense, some of them had feelings of discontent with their present way of life, and they were already favorably disposed to move somewhere. But, then we asked, why did they move to Leisure World?

The following descriptions of those aspects of anticipated life in Leisure World are those which in-movers perceived to be important in influencing them to be there rather than in some other place. One explanation is that these persons considered themselves to be in good health. About 64 percent of the interviewees considered themselves to be in better than average health, 21 percent in average
health and 15 percent in poorer than average health. So only 5.6 percent of the responses given indicated as a reason for the actual move the need for medical care in the future. None of the data show that health considerations were a major motivation for this move. It is seen as a factor, but with less weight than other factors.

It was anticipated because of the emphasis on social and recreational activities by Leisure World that these factors would be of some importance in attracting individuals there. Indeed when we asked what were the most positive kind of anticipations the in-movers had regarding their future life in Laguna Hills, 41 percent of the responses indicated this was so and only 5 percent found the emphasis on activities threatening. There seems little doubt that the effort of the builders and planners to make leisure attractive and to have many activities easily available motivated a large number of in-movers. On the contrary, not everyone loves great sociability so 28 percent of the group anticipated moving for reasons of security (the wall), privacy, achieving a more general kind of leisure and a lessening of responsibility. Further examination revealed this group as "withdrawers" who regarded their future years in Leisure World as a kind of protected way of life in which no demands would be made on them to socialize or participate in social or recreational pursuits.

Twenty-five percent of the total responses of the in-movers explained their move in terms of the general advantages of living in the community life of Leisure World. "No traffic", "good climate", "level terrain", "nearby shopping facilities", "good neighbors", "good class of persons moving into Leisure World", and so on. Thirteen percent of the favorable responses dealt with what they liked about the housing units themselves, stressing their right size and the provision for maintenance of their lots and the general areas. Six percent commented that the cost for all of these good products was very reasonable. We can subsume most of these reasons under two headings: "Convenience" and "Attractiveness."

The Katz and Lazarfeld "Influence Leadership" studies illustrate the fact that people generally seek supportive advice in making important decisions. It was desirable to know what persons had influenced the move positively or negatively. Three sources of help were discovered, families, friends and professional counselors. Nineteen percent had help from some member of the family such as advice, financial help, discussion or transportation. Eighty percent of family members were favorably disposed to the move and only 15 percent
were opposed. Among non-family members, friends and professionals gave the most help in discussion regarding the move. Approximately 62 percent of the discussants rendered favorable opinions, 20 percent were 50-50 and some 10 percent were opposed. One implication of this finding is important because not only family members but a high majority of other segments of the public — friends, neighbors and professionals — seemingly do not agree that age segregated communities are invidious or destructive. They not only sanctioned, but often times encouraged, the decision of the potential in-mover.

One of our most striking findings about the motivation to move to Leisure World is the fact that these in-movers were not moving away from friends and neighbors — in many cases they were moving with them. Of the 363 residents who in the final analysis indicated their intention to move in, some 58 percent were moving with the knowledge that some of the friends and neighbors were also going to be in-movers and about the same time. One can hardly overweigh the importance of this discovery. Another 17 percent of the in-movers knew that some relative would be in Leisure World. It is of some significance to discover that these in-movers do not enter a “foreign” community as isolated individuals. They were taking part of their social security with them. It would also be useful to know in a contemporary study of motivation if present day in-movers have this same kind of arrangement and motivation.

Also some seventy percent of the in-movers claimed to know others who already had lived for some time in comparable retirement communities and of these residents some 91.4 percent reported favorable reactions to their lives there. Thus, in terms of influences it may be said that the in-movers were favorably encouraged by the families, by their friends, by those who had or were living in a comparable setting, and professionals whom they supposedly trusted as advice-givers. All of this advice and assurance surely produced a total body of opinion extremely favorable as a basis for the final decision.

**Personal Recollections of the Early Days**

The early days in Leisure World — especially those at the time of the arrival of the first resident — can be portrayed effectively by personal recollections. Such recollections as those that follow, capture to a considerable extent the initial excitement and the continuing spirit of Leisure World.
The approach to Leisure World off the freeway was dominated by a huge metal globe, beautifully colored and set in a pretty planted area. It turned regally, and was lighted at night. "As The World Turns," of soap opera fame represents that show. Our colorful globe represented Leisure World.

Our apartment was on Via Castilla, inside the only gate then in existence. It was in Unit No. 1, Building No. 1, and was a two-bedroom, two-bath dwelling which did not include carpets and drapes. The down payment was $1,500.00, total price $15,000.00. Nothing was sold for cash and an FHA loan had to be negotiated. The loans were for thirty years, I believe, and all apartments were cooperative. Monthly payments were $160.00. The sales office was where the security office is now.

Clubhouse No. 1 was built with hobby shops and swimming pool. One of the rooms in this clubhouse was our medical center, with a doctor and therapist in attendance.

We had a nine-hole golf course with a temporary starter shed. If anyone wanted to play eighteen holes he or she just played around twice. There was no fee, and one frequently saw animals on the course — rabbits, squirrels, and, occasionally, a small harmless snake.

The nearest market was in El Toro. It was a small "Papa and Mamma" store that catered largely to the Mexicans who worked on the surrounding ranches. Because of the lack of refrigeration, meat was not available every day. Extensive marketing had to be done in Tustin or Laguna Beach.

The only church was in El Toro; the tiny Episcopal Church which is now a monument. There was no resident rector but once a month a minister from Santa Ana came to conduct services. The congregation averaged twelve persons.

Across the freeway where Lake Forest is now, there was nothing but open fields. In fact we used to go dove hunting there when the season opened in September. The first advertising sign that was erected was a source of amusement to us. Lake Forest, we thought. No lake and no forest!

Moving day came and was well organized and what few guards we had could not have been more helpful. Coffee and donuts were
served in the laundry-room to all weary new-comers.

Because most of us had come from larger homes our furniture didn’t fit into their smaller quarters. Huge pieces of furniture sat outside looking forlorn and sulky while we attempted to make them smaller so they could be wedged inside.

To sum it up, we had no markets, no banks, no churches, no hospital, no filling station, no newspaper. It was a peaceful rural area, surrounded by green hills.

We had no traffic, no wall-to-wall people at the many clubhouses. Maybe this sounds a bit dull, but we did have a happy, close-knit group.

We cannot be unhappy with the beautifully coordinated development, but those of us who were here first do have a feeling of nostalgia about what “Used to be.”

THE EARLY DAYS IN LEISURE WORLD WITH

MARJORIE AND LUDWICK COOPER

By Evan W. Baker

Leisure World in Laguna Hills owes much of its charm to good people like Ludwick and Marjorie Cooper. After looking at many retirement communities throughout California, they decided this was the best, so they moved into manor 18-0 on September 25, 1964, along with others of the second group to occupy homes here. The first move-ins were in September.

Ludwick “Coop,” was employed as an officer of the Los Angeles County Probation Facility, and Marjorie was supervisor of nurses at the same place. She continued her employment for four years after they moved here, but he remained on the job until 1974. Getting to and from work meant a drive of thirty-seven miles each way, in separate cars, but both proclaimed they did not mind the drive. “In fact, we enjoyed it,” said Marjorie. “The road was only two lanes, and fog-shrouded during the winter months. There was very little traffic, and on some of those foggy mornings we could tell, roughly, where we were, by the fragrance of the orange blossoms.”

In those early days the Coopers had few neighbors, but all residents were friendly and sociable. On week-ends busloads of prospective buyers would go by, pointing out in excitement, “Look, there are
some people who live here!" And when moving vans came with new arrivals, residents would converge to make them welcome.

The Coopers were concerned about their location because a large hill obstructed their view. "Don't worry," said the salesman, "That will be removed." And it was! Now the land is level, with an excellent view of streets, homes and landscaping.

On summer evenings they could sit outdoors and hear the bark of ground squirrels and coyotes. Night driving called for care because of deer crossing El Toro Road. There were few lights in Leisure World to dilute the darkness, and silence was gratefully accepted.

For exercise and sociability the Coopers enjoy square dancing. In November of 1964, Herb and Barbara Lesher started a square dance class with eight people (one Square) plus a few extras for fill-in. Herb and Barbra frequently brought their Costa Mesa Club, the Square Riggers, to make a better showing on the dance floor. Even so, there were usually more spectators than square dancers. Participating in the original group were Ray and Adell Barmore, Grace and Johnnie Brown. Marjorie and Ludwick Cooper, Ina and Mac McCartney, Lucille and Wes Parsell, Lawrence and Jo Pelton, Jake and Zeda Riedel, Larry and Madge Taylor, Leonard and Alta Van Lossbrock and Cy and Zetie Walton.

After more than thirteen successful years the Leshers are still the square dance coordinators, but their classes have increased to four groups of different levels of ability in square dancing, and several groups in round dancing. Most of their time is now devoted to the burgeoning rolls of Leisure Worlders who look to dancing for exercise and sociability, and the Coopers are members of the most advanced group — the Globe Twirlers. In fact they were honored in 1969 as charter members at the five-year anniversary, and again in 1974 they were chosen as King and Queen of dance groups at the tenth anniversary of Leisure World. During that celebration the Coopers were dressed in royal splendor as they led the grand march in Clubhouse Two. Congratulating them upon their accomplishments were speaker Robert L. Price, Leisure World Administrator, H. R. "Skip" Stone and Richard Way. An enthusiastic crowd of dancers and spectators applauded the colorful event, and the dances which followed. The evening was topped-off with tasty refreshments.

On New Year's Eve, December 31, 1964, Leisure World Management gave a party at Clubhouse 1. There was dancing in the main
lounge, and refreshments were served in the art gallery. Various mixers were provided, but those wanting something of a stronger nature were expected to provide their own. At that time we were less than 400 residents.

Also, in those bygone days, eighty percent of Blue Cross was paid by Leisure World, and the pharmacy furnished prescription drugs at twenty percent of their cost. When Medicare came in, those windfalls were discontinued.

Continued growth of the community resulted in clouds of white dust as earth-moving equipment laid the land bare. But as soon as a group of manors was completed, landscapers moved in to plant trees, shrubs and sod. Almost overnight the scene was changed from drab to beautiful.

I REMEMBER THE OLD DAYS

By Marjorie J. Jones

First move-in day, September 10, 1964, was hot but not like the 105 degrees of a few days previous.

There were no phones although some had made early application. Eventually 40 miles of telephone cable would be installed but with 95 percent of the manors wanting phones even in those initial days it was not an overnight accomplishment.

A courtesy to newcomers was the serving of hot coffee and doughnuts in the laundry rooms. Warm weather or not the work break was welcome, but with one exception — one man without thought for glass doors, tried to walk through one without opening it. He was not seriously injured but was grateful for quick medical care. Nurse Margret Nelson remarked afterward, “Paul Shepherd of Physical Properties had decals on every door within hours.”

Reactions of the first residents were interesting. Most had remembered to bring food with them but not all, nor did they remember that Manning’s Snack Shop closed at 5 p.m. as did the little store. The choice was to go hungry or rush down to Laguna Beach. With the doughnuts and coffee and good neighbors sharing, all survived until morning.

There is no doubt that some slept uneasily the first night. The large 16-manor buildings, only half full and with open halls and stairways, were seemingly vulnerable. Planes going over the green belt
Nostalgic to many Leisure Worlders is the "old" medical center (above) that dated from the beginning of Leisure World, but has given way to the modern Saddleback Community Hospital and Health Center. One of the many continuing volunteer activities in support of the facilities is "Meals On Wheels" (below) in which dedicated residents deliver to shut-ins the meals prepared at the hospital on doctors' orders.
might be a new sound for some. An eerie howl of a coyote or the bark of a fox during the night might remind folks that across the street was the still undeveloped habitat of the wildlife.

Friday, the second day, all having survived, they were strangers greeting strangers, soon they became friends on first name basis. The term “Instant Neighbor” was born.

Mr. and Mrs. Wellnick, opening their windows in the morning drew back in astonishment. In the front yard gardeners were unrolling green turf on their premises. Being from the northeast, when it was all down and the workers had moved on to another site, Mr. Wellnick commented, “We knew some of the places had lawn but we didn’t know it came like this. Back home I had to plant seed and hope it would grow. And those men — they just stuck the plants and shrubs in the ground.”

Jack Pas, who claimed he only came to Leisure World because it has a free golf course, did not waste any time trying out the new links but he was not always first on the course. Lloyd Richards finagled a pass from Dick Gee, first recreation director, before the opening day of play and was seen there every day, or almost every day.

Jack Pas and the others were soon talking of forming a Men’s Golf Club. They did not limit it to resident membership at first since they had found it necessary to solicit outside membership at first to fill their foursomes. Pas was elected first president of the club. Membership records show that Lloyd Acord, of Acord’s market in Laguna Beach offered a prize of $25.00 worth of fresh beef to anyone making a hole in one the first day. It turned out there were two the first day and the offer was not heard of again.

Clubhouse 1 was the general meeting place although Clubhouse 2 was being built and being closely watched by the golfers. Clubhouse 1 had an Olympic size swimming pool ready for use. Shuffleboard courts had been installed and one wing of the Clubhouse was equipped with hobby shops, ceramics, art and woodworking shops and more. People were signing up in the Education and Recreation Department for avocations they never had time for before. Even classes were being started by volunteer instructors.

**Shopping Bus**

Since bicycles were very much in favor, a cycling club was formed and residents were exploring the countryside.
Twice a week a large bus took shoppers to Larwin Square in Tustin to stock up on staple supplies. Not all went for food — there was time enough for the beauty parlor or the barbershop or just to look around before the return trip. A few went along just for the ride. Fragrant orange groves through which they traveled are almost all gone, torn out for residential housing lots. Mrs. Burger was one who voiced praise for the shopping service. “Not only did the bus bring one to his own building but when there was a heavy load the driver carried the packages into my manor.”

As the move-ins continued at a regular twice a week schedule it was not long before 19 buildings were fully occupied. With so many people living in the area in October 1964 not only were they “Instant Neighbors” they had become “Good Neighbors.”

The first buildings were around a circular park and spaced back from the edge of the steep slope down to Calle Aragon. When residents were settled, this path wandering along the line of construction became known as Friendship Walk. Residents have placed a memorial plaque on the walk in remembrance of Rowland Wilson who designed and planted the walk’s shrubbery.

The first “Instant Neighbor” experience enlarged itself by molding with those that came after until it became known as the “Spirit of Leisure World.”
IV

Self Governance
And Leadership

Self-governance and leadership are alive and well at Leisure World. Effective self-governance has evolved over the twenty-five years of Leisure World history through the leadership qualities of the first residents and those who have come later. The achievement is especially noteworthy because of the fact that Leisure World is the largest retirement community in the world that is self-governed!

As one looks back over the preceding chapters it becomes obvious that the founding and early development of Leisure World grew from dream to reality through the efforts and hard work of many people. Leadership was provided by experienced professionals dedicated to the concept as perceived by Cortese and the Rossmoor Corporation, and supported by those early residents who, from the time of “move-in” became involved in decision making.

Background

Likewise under local and federal mandates bringing into existence the cooperative approach to self governance, such was virtually a reality from the time the first residents arrived. As both construction and sales increased and as organizational and management techniques unfolded the more people became involved, and thus self governance became the foundation on which twenty-five years of progress has been based.

Actually the Laguna Hills project came after the near completion of the first Leisure World at Seal Beach. Experience gained there plus increased research into retirement needs, desires and hopes led to a more stable approach by the Rossmoor Corporation, thus avoiding many of the earlier mistakes and problems which marred the early days at Seal Beach. Builders, planners and leaders among the residents at Laguna Hills provided a better sense of direction.
FHA Impact

It was under the provisions of the National Housing Act, Section 213, which really opened up the potential of leadership and cooperative enterprise in Leisure World. This was true in the areas of building and development, management and residential participation. It was clearly defined that under Section 213 a housing project built according to its provisions must provide a plan of ownership and governance by the residents. It was called "cooperative housing" and brought into existence a combination of talent and leadership rarely found in a mere housing development. This basic principle had to be met in order to secure FHA financing involving forty-year mortgages at 5 1/4 percent and allowing only a small down payment.

In order to receive FHA compliance it was necessary to do much more than merely apply for permission or support. FHA had never been confronted with such a large project as Leisure World or with one as complex in its very nature. It was vital that Cortese and his associates keep up the pressure and cut through barriers of red tape characterized by bureaucratic restrictions.

Among those early leaders were men of vision and experience. First was A. Oakley Hunter, whose previous experience as both Congressman and an FHA Commissioner had given him the knowledge and expertise to walk the hallways of Washington, and to talk with the right people. Much of the success which was attained was due to the ingenuity and persuasive approach of this leader. Later he became head of the Federal National Mortgage Association. It could be said that Hunter was the key to the Cortese dream and helped make it come true.

The other of this early trio was Lewis M. Letson, a hospital administrator who brought to the planning an understanding of management with all of its implications for the people and their participation in the process. In addition his insight into the complex nature of comprehensive medical care and services led to the early incorporation of health care plans for Leisure World. As the first administrator at Seal Beach, he learned what to do and what not to do at Laguna Hills. Early mistakes plus many difficult problems were thus avoided in the trying days of bringing into existence a Leisure World for retirees, the size of which had never been seen before.
In fact, the huge size contemplated for Leisure World had been one of the factors in dealing with the FHA. Their experience had been with small housing projects and now they were confronted with one initially projected for over twenty thousand residents. Here it was that Cortese and his group fought a vigorous battle and won. They had to have the support of FHA and they got it, to the benefit of all concerned. Tenacity, a strong program and excellent leadership paid off.

Management Emerges

A key aspect which had to be incorporated in planning Leisure World governance was the requirement of FHA that the developer, Rossmoor Corporation, was to have no voice in the management of the community and its several emerging corporations. The Section 213 stressed the concept of people getting together, forming their own corporate structures and then employing a developer and builder to construct the physical plant.

However, in the case of all Leisure Worlds, this approach was hardly feasible. There were no people to start their own non-profit corporations, hence these had to be created on paper and permitted to be born after the fact. This was done by Rossmoor out of sheer necessity, but adhering to strict rules from FHA to keep hands off once created.

It was here again that the political and legal background of Oakley Hunter served well all the parties concerned. His law firm was the catalyst, drafting all of the documents carefully and with particular attention to the preservation of the autonomy of the groups of people who would later own the community.

From this emerged several community corporations (Mutuals) with "figurehead" directors and cross agreements which created the necessary legal relationships as required by law.

During this same formative period a management company was created with a number of prominent leaders on its Board of Directors. This was the Leisure World Foundation with Lewis M. Letson as leader. Shortly, William Simon took over the position with title as President. Simon was a retired FBI administrator and close to the national scene as well as the Los Angeles area. Hence, by 1964 the pattern was beginning to emerge which would guide the future development of Leisure World.
This new foundation in turn sponsored the early mutual corporations and also the Golden Rain Foundation of Laguna Hills. It likewise set up the sales program with the creation of another company named New Horizons. In addition, the Leisure World Foundation took over the management of the affairs of each Mutual as it was formed and the Golden Rain Foundation.

Responsibility for sales, however, remained with the Leisure World Foundation through the development period of all of the first twenty-one Mutual Corporations. In 1965 the contract with New Horizons was terminated and the Leisure World Foundation assumed the direct responsibility for the sales program including sales personnel, policy determination and advertising. Rossmoor continued its own program.

Another factor which influenced the early development at Laguna Hills was the impact of the Seal Beach Leisure World experience 1962-1964. It is true that Cortese's concept for a retirement community began at Seal Beach, but its long term development and fulfillment was destined for Leisure World Laguna Hills. As mentioned earlier in this chapter, certain lessons were learned at Seal Beach, especially in the fields of management and governance. These caused changes in the initial documentation of the first mutual corporation and the Golden Rain Foundation of Laguna Hills.

This was especially true in the legally prescribed relationship between the two. The Golden Rain Board of Directors had been placed at the very center of governance and management at Seal Beach, but at Laguna Hills it had a less powerful role as custodian and overseer of only community wide responsibilities other than those in the housing area themselves. This enabled Leisure World to develop with strength and balance based on an awareness of the importance of both corporations.

It was also apparent that misunderstanding and possible future conflicts could be avoided by separating the image of the Leisure World Foundation from that of Rossmoor Corporation. At Seal Beach this was not understood and led to two years of conflict with the final result being the end of the contract with the Leisure World Foundation.

Not so at Laguna Hills. Backed by the agreement with FHA which stipulated that the managing agent could not be fired without Agency approval, plus wise leadership and good public relations, a sound cooperative program has been maintained over many years. This trend was strengthened by the selection of competent and wise
leaders in the management field. Edward Olsen became President of the Leisure World Foundation and Robert Price was brought down from Walnut Creek, California to become the Administrator. These appointments occurred in the fall of 1964 with Price assuming office November 23, 1964. He had been director of Physical Properties at Rossmoor’s Walnut Creek operation, but for many years before that had been active in the field of city management and community activities even as far away as Afghanistan where he taught and supervised the training of city managers.

Olsen came from the office of the Federal Bureau of Investigation in Los Angeles where he had been both in the legal and operational phases of the organization. He became the head of the Leisure World Foundation and later of the Professional Community Management Corporation known as P.C.M. His leadership and involvement was to be most significant for nearly twenty years. Both Price and Olsen were key figures in the evolving plan of administering the affairs of Leisure World and in working closely with the Rossmoor Corporation in the building and development of the complete project.

Paper Structure to Reality

By the fall of 1963 construction was underway at Leisure World. Models were being built, Clubhouse No. I was under construction, site preparation for residential housing had started and the transformation of raw ranch land to the beautifully landscaped Leisure World appeared almost a miracle of achievement. However, as pointed out in earlier chapters there were many and difficult problems to overcome by both builder and management. This was especially true of the location of the property bought by Cortese which was located in the flight pattern just south of the El Toro Marine Air Station.

The Marine Air Corps immediately attacked the planned development and carried their protest to Washington. They were able to persuade Orange County and the FHA that all approvals should be denied until Rossmoor agreed to certain restrictions involving flight and landing patterns at the Air Base. Even though FHA had given site approval, it was rescinded until the matter was resolved.

After relatively long negotiations and revisions of development plans, agreement was reached that cleared the way for final approval. Probably the most important change was the creation of a so-called
“Greenbelt” which cut through the heart of the planned development. It meant relocating the golf course to its present location, and elimination of many proposed residential units. Any construction in the “Greenbelt” was strictly limited and has continued in effect over the years. In return the Marine Corps agreed to fly at certain altitudes and use the “Greenbelt” as its approach landing pattern.

With this solution and clearances received, construction moved forward at a rapid pace. In fact, before Rossmoor opened Leisure World for sales, they had fifteen million dollars invested in the property. It speaks highly of Cortese’s foresight and determination when one considers such an investment in an unknown area and not knowing whether buyers would be receptive to a retirement community. Likewise, there were no restaurants, shopping centers and very few amenities known today.

Cortese and his associates knew they had to generate interest on the part of buyers, hence there had to be clubhouses, an 18 hole golf course, landscaped streets and well designed and planned residential units. In addition, Rossmoor had to agree to construct a sewer treatment plant and a water system. These so-called “front” expenses made up the fifteen million dollars mentioned above.

A water company was formed and a contract with the El Toro Water District to obtain delivery was entered into. A sanitary disposal plant was built and these services were provided by two companies which became independent of Rossmoor Corporation. Provisions were made for effluent from the disposal plant to be used for irrigating the golf course and now after twenty-five years of efficient supervision, new lines are being laid to replace those installed back in those early days.

Another company, namely “Crestmark” was established to provide new incoming residents with home furnishings, carpets, rugs, drapes and various necessities not found in the area surrounding Leisure World. Later as commercial development along El Toro Road began and retail services of all kinds were provided, “Crestmark” was closed down; however, it served a real need in the beginning.

**Early Residential Input**

With sales beginning in February 1964 and the first move-ins arriving September 10, it was obvious that the issue of how to govern
Leisure World to the advantage of all was a compelling problem. As clusters of residential units or "manors" were built and occupied, they were considered as "Mutuals", utilizing the implications of a cooperative enterprise. Thus, Mutual I was the first delineated area to be so named, with other units being organized in numerical order. Hence the term is still used, even though over the years many small mutuals were consolidated into much larger ones.

By the end of 1964 the occupancy had risen from that of 10 families arriving on that memorable day of September 10th to 931, and the rush to Leisure World was under way. Everyone had to learn together about living cooperatively — a new experience for many, both in management and local governance. However, leadership qualities were evident from the beginning of occupancy along with a desire to serve. This trait was revealed in the type of people who have made Leisure World the kind of retirement community it is today. Combined with the qualities found in leadership personnel in the Leisure World Foundation and the Rossmoor Corporation, it was in a sense the melding of these groups that made real the retirement dream for thousands of people.

They came from all sections of the nation, from Maine to San Diego and from the Pacific Northwest to Florida. Excellent advertising by Rossmoor and the sales organization was nationwide. Eventually the New York Herald Tribune sent a special correspondent to Laguna Hills in 1969 to interview residents and board members about this unique community. This led to a splendid article in one of their Sunday editions with Leisure World featured as an outstanding example of all retirement communities in the United States.

Potential leaders and people with outstanding records in nearly all the professions and business enterprises flocked to the various sales lotteries when a new Mutual was opened for sale. This type of sales appeal worked well with many potential buyers lining up for hours before numbers were called and sales made on the spot to those who had chosen a site.

It is little wonder that in looking back over a twenty-five year span of Leisure World history, it is safe to say that few if any other such communities could boast of the reservoir of talent, professional and business experience, educational background and training, as well as actual participation in management and governance in our towns and cities. Lawyers, doctors, ministers, teachers, university professors and administrators, retired military officers, both Army,
Navy and other services were all represented, plus those from scores of business and professional occupations.

All of this impacted on the entire Leisure World community. The quality of governing boards was superb. People began to get involved in a great variety of activities from the beginning. Clubs and societies sprang up almost immediately reflecting the interest and talents of those whose desires for self expression and active participation in the life of the community needed organized outlets.

The time and effort given by residents to the overall structuring of a complex and vigorous retirement culture literally made Leisure World what it is in 1989, recognizing however, the solid base on which it was built, plus the imagination of Cortese and those early management personnel. It all had to go together and with the growth from 20 families to nearly 22,000 people today, Leisure World is truly a miracle of achievement and a tribute to all of those who made it possible.

If one wishes to verify the qualities emphasized above, just read the list of Leisure Worlders of the Month — a program of recognition established in 1976 and carried on by Rossmoor Corporation until 1980 and continued by the Leisure World Historical Society.

Learning by Doing

In the early years of a new and growing Leisure World, everyone including the staff and the people moving in, had to learn something, namely — about sharing. Living cooperatively was a new experience for many people in those days and for the first comers it was particularly true. The whole philosophy of living in close proximity, of sharing responsibilities and activities and of planning for increasing numbers of new residents, some of whom would be facing problems of adjustment — this and much, much more required careful consideration.

As Robert Price was to say, even management had to learn that it was not just the involvement of property or the control and supervision of financial arrangements, but the new part was "people relations". The retirement dream could only become a reality and succeed if and when people as a group learned how to structure themselves and work together in harmony and cooperation. Management also had to learn that lesson and, therefore, be the teachers and leaders of those coming in.
This was particularly true in the formation of local governing units, in the use of facilities, and in proper maintenance of mutually shared property. This took time, and many problems that might appear small and insignificant today loomed large at a time when surrounding lands were unoccupied and the yelp of a coyote could be heard at night.

Patterns of Development

With construction financing being provided by United California Bank and with people arriving, operational management was almost immediately shifted from outside the community to the Laguna Hills site. The arrival of the new Administrator, Robert Price was on November 23, 1964. He was advised by the President of the Leisure World Foundation, "Bob, remember as you go to Laguna Hills you work for the Leisure World Foundation and for the people, you do not work for the Rossmoor Corporation."

At that time two department heads were under fire and threatened with termination. These were Dr. David Zaugg who headed the medical department and Paul Shepard who was in charge of physical properties. Minor conflicts with Cortese were involved, but Price was able to work out solutions and they remained on the job. Particularly was this true in working through Al Ceresa who was a top executive of Rossmoor and close to Cortese. Ceresa brought an outstanding personality into the management picture, plus a complete understanding of all the various details and nuances of a complex relationship.

With Ceresa serving almost as a liaison officer between factions, rough spots were smoothed and the way cleared for continuing operations. Terms of agreement with FHA were specific in that the people could not fire the management agent without FHA approval. At Seal Beach the whole setup had been marred for a time with early Boards in conflict and with people attacking the governmental structure and even Cortese. This led to a study by the School of Public Administration of USC and recommendations for changes and improvement in relations.

Division of Responsibilities

Not so at Laguna Hills where the lesson was read loud and clear.
Even before Price began his long tenure as Administrator the writers of the documents for Laguna Hills saw to it that the trust agreement between the Golden Rain Foundation and the Mutuals specified that the GRF was to look after certain matters which the Mutuals could not do for themselves such as manage recreation facilities, security services and transporation development.

As has been explained, the Golden Rain Foundation is another Corporation along with the Mutuals. The key to understanding the total management picture is simply that Mutuals have their own ownership and responsibilities and Golden Rain has its ownership and responsibilities. One is not over the other and that has always been respected by all parties.

However, it should be made clear that Golden Rain is the only corporate body that every individual belongs to as a resident member so the “umbrella image” no doubt still prevails. But this division of control and responsibility which divided authority equitably between Golden Rain and Mutual Boards of Directors made for the stability which prevailed in the Laguna Hills project.

Everyone had to learn quickly and together. People had to learn one primary lesson — it was the lesson of sharing. Management had to learn that its responsibility involved not just property management but relations with people which in turn presented a variety of problems — economic, social and personal.

With people buying and moving in by the score month after month, management had to be teachers and counselors as well as looking after the mechanics of governance. It is obvious that much had to be learned through experience and this took time. There was concern as to how far regimentation could or should go, and what should be the part of management in enforcing such policies. It was soon learned that basic to cooperative action was patience, and meeting every problem head on through discussion and within the atmosphere of a desire to work together.

With the building and completion of clubhouses having facilities for recreation, meeting rooms and even dining facilities, there was a concern as to whether people would even use them. Needless to say, people reacted favorably and soon began to organize as groups, or clubs and societies. Management soon discovered that by putting up notices on bulletin boards, people would come in to the administrative offices asking to have a club established or how to participate in a particular event listed on the board.
Again, as Price explained, the staff was kept busy sharing the hopes and desires of the people by providing guidance and direction and at the same time widening their own horizons as to what was needed to meld the people into a cohesive whole.

In those early days the staff meetings often were given over to talking about management philosophy and out of those discussions emerged two main themes. The first was that the staff had to be responsible for its actions and secondly, they had to be responsive to everybody's call. There was no such thing as a crack-pot call, no such thing as a quick brush off or of denying a request without making it clear why the denial was necessary. Everyone and everything was important and if it could not be handled by the staff it generally ended up on the desk of the Administrator.

The idea that everyone was important tied in with the whole concept on which Leisure World was built. That fact has persisted over the years and remains one of the features which still draws people to Laguna Hills.

**Leisure World As A Business**

Another factor which had to be implanted in the resident's mind was that this whole operation was a business and not a city. Many think of Leisure World as a governmental unit, but it is not that at all. It is a private business owned by all the people, yet operated as a governmental unit. The concept came to prevail that the existing pattern of mutual trust and cooperation could work efficiently and effectively and the changeover to a strict city type structure was unnecessary.

Likewise, from the beginning it was required that the Administrator could not live in Leisure World. FHA in its experience with cooperatives, even with small ones, mandated as an absolute rule that a resident could not be the Administrator. Experience proved this regulation to be sound in that of all officials the Administrator had to maintain the highest degree of objectivity and fairness in equal treatment to all. One could not afford to be trapped into favoring one clique or group until all the facts had been analyzed and an objective judgment reached.

FHA officials explained that disasters usually occurred when management or the people tried to manage their own affairs without reference to each other. That is the basic reason why an independent
management company was required to be of a professional type and that the Administrator live outside the community. That helps to explain why the Leisure World Foundation and its successor in name P.C.M. has remained a viable and important facet of twenty-five years of service.

Much of the credit for the translation of theories and concepts into actual practice goes back to Oakley Hunter and Cortese. Hunter was the legal Godfather of the community. The dream, the ambition and the courage came from Cortese. Leisure World was built under the concept of members of a non-profit corporation who decided to build themselves a housing project. Hunter created the concept of the Mutual corporation representing the incoming people; he did the legal work and negotiated with Rossmoor to do the construction. It was a relationship that had to be fostered and protected at every step. In doing so, all the various documents had to maintain the absolute independence of the people.

At the risk of appearing to be repetitious, it must be clear that the Leisure World Foundation in its original dimensions was a dream of worldwide significance. There were to be many Leisure Worlds and many Leisure World Foundations. Several were developed and completed in various parts of the country, later to be sold or allowed to become independent. Of all these, Laguna Hills remains the showcase and most elite of all — the star in the firmament of retirement communities.

Some Personalities and Impacts on Operation

When Price arrived as Administrator, the chief administrative officer of the Leisure World Foundation had changed from Simon to Edward Olsen — to whom Price reported. On the Board was Ken Be Lieu, a retired army colonel, Dr. Floyd Wergeland, Robert Carithers and Carl Roesseler. These were the top executives at headquarters, supervising the affairs at Seal Beach and the projects in Maryland, New Jersey and Chicago. Price, as the Administrator at Laguna Hills, had to work closely with all the staff officers. He makes an interesting observation; namely, that relations with Cortese were sometimes "rather strained".

As the builder, there was the natural tendency on the part of Cortese to "run the show" for, after all, he was putting up the money and building mutual after mutual. However, legality was on the side
of the Foundation staff. Even though confrontations were not infrequent, compromise and understanding brought sound solutions. At this point Al Ceresa entered the picture in working closely with both groups.

All of these activities now combined to create the need for a physical facility. This part of the dream led Cortese to build "The Taj Mahal" as a symbol of its reality. It was a magnificent structure and still stands today as a landmark of Cortese's imagination. It was used as a super office building with luxurious board rooms and Cortese's own office complex. Later it had to be sold because of financial problems, but it is an everlasting reminder of those early years in the evolution of Laguna Hills.

In a talk given by Al Ceresa in Leisure World before the Historical Society, he mentioned a two million dollar debt owed by the Leisure World Foundation. The facts bear out the allegation that all the early money of the Foundation was advanced by Rossmoor Corporation. In truth, the Foundation had been established without money or assets. All of the money was advanced in order for the Foundation staff to do all the work of preparing the new Mutuals, to hire attorneys and print the necessary documents. They also had to do all advertising and sales promotion with advanced capital. At last it was agreed that there would be written documents dealing with the debt and specifying the manner of repayment to Rossmoor. This was to be accomplished through continuing sales with a certain amount being set aside from every sale and paid to Rossmoor. All of this, however, referred to cooperative type Mutuals since it was through them that the Leisure World Foundation sponsored the whole development from construction to sales.

Emergence of Governance Structure

With financial difficulties gradually being solved, it remained for management and residents to work out the details of self governance and put a structured program into effect. Robert Price, as Administrator and representative of the Leisure World Foundation, had the responsibility for both managing the community and gradually transferring to the people the powers of self government. The question which had to be answered was how to get people together, to select leadership and increase popular involvement. The first step was for Price to meet with people from Mutual 1 with its
370 manors, along with the Director of the newly established Community Relations Department. Meetings were held with groups of people to find some who would serve on a nominating committee, and as various persons emerged as potential leaders, Price, as President of the Mutual, appointed the committee.

An outstanding accomplishment of this first committee was to develop the criteria for selection of a Board of Directors. The need for such a statement of qualifications was self evident. Thus following numerous discussions and "brain storming", a list of criteria was established and remains as the permanent basis for selection of board members. The criteria have been important in maintaining the highest quality of personnel on all boards and subsequently in providing the quality of life that is found in Leisure World.

These criteria are as follows:

1. Candidates should have a sound business background.
   (Each Mutual is a million dollar business)

2. Each should have leadership talents.
   (Leisure World is a member owned community)

3. Each should have high dedication to the community.
   (Consideration and understanding of the welfare of others is the keystone to cooperative living)

4. There should be no conflicts of interest such as being involved in any business activity with the residents.

5. Each should be available most of the time.

6. Each should be willing to serve.

   These six criteria were repeated with each new mutual and Golden Rain elections. In later years experience dictated an additional one, namely:

7. Is the person physically able to serve.

   It should be obvious that even with a clear set of principles and
criteria, it could not be expected that each person nominated for office should, or could fit the same mold. In fact, it was desirable from the beginning to draw on people with different backgrounds and experiences. It was indeed fortunate that arriving residents provided such a variety of talent that nearly all areas of concern in a self-governing program could be covered with experienced leadership.

Members of the committee which drafted the list of criteria consisted of Don Roddan, Elmer Poirier, Carl Schneider, Lindsay Williamson, Floyd Bailey and Bernard Ingram. Under the overall leadership of Robert Price, it was recognized that the success of community governance would depend not only on the quality of directors, but also on the pattern and results as established by the action taken by Mutual 1. This assumption was correct and cleared the way for similar actions by subsequent mutuals as they were created.

Thus, with the first mutual, new and sound relations were established between management and governing boards within an atmosphere of trust and confidence which was reflected by board actions and management services. As Price wrote in one of his many memos, a lot of learning went on as areas of this new community leadership territory were explored.

The first board was made up of Daniel “Ted” Thomas, Loyd Moore and Robert Price. These early Mutuals were quite large and were established rapidly, one after another. By the end of 1965 there were four resident boards. From the leadership of these came the first elected directors on the board of the Golden Rain Foundation of Laguna Hills. Under the by-laws of Golden Rain it was stipulated that each Mutual was a corporation member of GRF and that one director of the GRF Board should be chosen by each Mutual Board. Thus, the first Golden Rain Board had representatives from Mutuals 1 through 4, four persons from management and an additional person chosen at large, making up a board of nine members. Robert Price was chosen as the first president of GRF and held that office until the spring of 1971.

One must keep in mind that unlike the Seal Beach approach, the GRF Board at Laguna Hills was not placed over the residential Mutuals, but served as merely one of the several community corporations, each with its own share of ownership and responsibility. This was clearly spelled out in a so-called “Trust Agreement” in which, with the approval of FHA, all the Mutuals joined in
designating that GRF should hold certain community type properties in trust for the Mutuals and make them equally available to all residents. Even today some continue to look on the GRF as a super corporation even though it is only one of the several corporations at Leisure World in which every homeowner holds a resident, though not a voting, membership.

**Trial and Error**

During the early years the presence of the Rossmoor Corporation was more than an illusion. Actually while management and Mutuals were striving together to develop a workable plan of self governance, Rossmoor was building more manors to be sold and occupied by newcomers. Thus, building and expansion went on, while more and more people were arriving to begin their initial experience of living in Leisure World.

Almost immediately there arose the problem of buyer satisfaction with his new home. Rossmoor had an excellent check-out system for the new manors supplemented by a team of on-site FHA inspectors. However, there were as usual various complaints from the new move-ins and these were received by the Leisure World Foundation, studied and sorted out and then relayed to Rossmoor for action if deemed necessary.

While this technique seems clear, it was not always so to the new resident who sometimes felt there was considerable buck passing. To them the office of the Administrator or of the physical properties department should be able to solve their problems. They were in no mood to try and understand the rather complex relationship of management vs. builder. However, despite incidents of misunderstanding, the basic system was effective with service to residents being stressed at every possible point. A community resident service desk was set up at the beginning and has continued down through the years. Likewise, Rossmoor created its own customer service office and staff in 1970.

**Need for Capable Management**

It must be emphasized that one of the factors which made Leisure World Laguna Hills the kind of a community enjoyed and loved by its residents was the continuing concern shown by management,
governing boards and the various operational departments of the welfare of every person; no matter was too small to be overlooked. After all, the customers and stockholders were the same people and in the middle, operating under contract was the management company — the Leisure World Foundation.

While Rossmoor was responsible for all warranty work which it carried out, the brunt of contacts and relations with residents was borne by the personnel of the management agency. In the long run this built a strong sense of confidence and respect between the people and management and has led to the use of such a strategy far beyond that found in most community developments.

FHA personnel from Washington D.C. always kept close watch over its largest housing project and often visited Leisure World. It was in this area of management — people relations — that they were particularly concerned. FHA had some bad experiences elsewhere in housing projects, especially when residents tried to govern and manage at the same time or employed weak management.

From this FHA concern the Leisure World Foundation had been created as a non-profit corporation and from the beginning had operated under outstanding board leadership. With William Simon at the helm, the Board of Directors included former Under Secretary of the Navy Kenneth Be Lieu, Henry O. Duque, lawyer, Y. Frank Freeman from the motion picture industry, Frank L. King, President of United California Bank, Allan Oakley Hunter, FBI background and former Congressman, Mervyn LeRoy, motion pictures, Walter F. O'Malley, lawyer and baseball magnate, Sylvester C. Smith, Jr. General Counsel of Prudential Life Insurance Company, and Norman Topping, President, University of Southern California.

These men were the ones who supervised the early management of Leisure World, including setting precedents, developmental policies and personnel selection. Their concerns also extended to other communities in Maryland and New Jersey where Rossmoor was developing additional projects.

**Growth of Self Sufficiency**

Obviously for any program to be successful it had to be properly financed and the cost of operations had to be met. While the Mutuals were by law self-supporting from their beginning, the costs of Golden Rain had to be subsidized by sales income which was carefully
planned and projected in order to prevent initial operating deficits.

Hence, various standard agreements were entered into by each new Mutual which involved financial, services, and regulations necessary for the protection and self-sufficiency of each unit. Financial details are treated elsewhere but they cannot be separated from the successful evolution of self governance for the total community. An example was the “Pre-Amortization Agreement” providing for the use of surplus funds to be paid into a common fund to be used by GRF to meet heavy initial costs. Likewise, income from new sales was an important factor in stabilizing the financial strength of each Mutual and GRF.

Such steps as indicated above added greatly to the stable and unique relationship that has prevailed between management and the governing boards over the years. It can be agreed that a firm financial base and infrastructure was basic to the long term success of the Leisure World concept of cooperative sharing and local autonomy in community affairs.

Monthly reports, including finances and budgetary matters were provided to every board on a monthly basis. Likewise, a formal budgetary plan covering all monies and services, was given to all boards for each new fiscal year. In turn, this budget was reviewed by all directors, and following various changes was ultimately adopted independently by each Mutual and Golden Rain. Community service came under the purview of GRF which assessed each manor through the several Mutual budgets for necessary costs and expenditures.

By the end of 1967 there were sixteen Mutual boards plus Golden Rain with a total of 64 Directors serving their respective corporations. Eventually, with later consolidation of the Mutuals being accomplished, the present three mutuals were established thereby cutting back on the large number of directors needed in earlier years.

Committee Structure and Impact

From the beginning of development at the Laguna Hills site and with the creation of self governing boards it was found necessary to create both standing and ad hoc committees to deal with the ever increasing problems of a vital community. This trend shows a slow but steady increase of such committees and the growth of their influence and importance in dealing with the great variety of problems found in a growing and dynamic community.
Nearly every board followed a common pattern of committee structure extending upward to Golden Rain. Generally the early Mutuals had a Finance Committee; a Legal Committee; one dealing with Capital Improvements; a Community Relations Committee; and a Health and Welfare Committee. In addition, ad hoc committees were established to deal with specific issues which arose with increasing frequency as the population increased.

Without detailing the yearly increase and evolving character of the committee structure, it may be interesting to note the current (1989) committee organization of Golden Rain. Note also that an early precedent was set to add to the list of committee members from all boards and a number of non-board members from the community under the term "advisors" or "consultants". This enabled the governing boards to tap the talent and resources of residents who had special qualifications for a particular set of problems and who had indicated an interest in being involved in local affairs. This not only opened more lines of communication with more people, but brought more expertise to the committee structure.

In addition to the Officers’ Committee of GRF, the following list of standing and ad hoc committees reveal the extent of local involvement in operations and management.

The list is as follows. Architectural Control Committee; Community Activities Committee; Community Relations Committee; Health and Social Services Sub Committee; New Resident Recruitment Sub-Committee; Television Services Sub-Committee; Government and Public Relations Committee; Airport Awareness Sub-Committee; Area Project Review Sub-Committee; Sub-Committee on Incorporation; Joint Budget Committee; Security Committee; Silver Anniversary Committee; Long Range Planning Committee; Maintenance and Construction Committee with Sub-Committees on Golf Course Irrigation and Transportation; Finance Committee with Sub-Committee on Insurance and Risk Management; Grounds and Water Committee; Human Resources Committee, and Legal Committee.

Many of the above GRF Committees have been and are more or less duplicated within the Mutual boards committee structure. Each of the committees listed above contain from two to thirteen resident advisors with the exception of the Joint Budget Committee, thus bringing together a solid cross section of community opinion. It can be clearly seen that by involving all Mutuals, the residents are
well represented in all governance procedures and in areas of
decision making. There can be no doubt that this entire evolution
of committee development has contributed greatly to the success
of not only solving problems, but in maintaining the pride and care
of residents in their Leisure World.

Growing Pains and Cures

It should be mentioned that along with the creation of board com-
mitees the Leisure World Foundation provided a staff member to
serve the committees and in several instances set up special depart-
ments to coordinate policy making and enforcement provisions.
It was in the sensitive area of residents with personal problems
that first impacted on the community and led to the creation of
a Community Relations Office as part of the administrative body.
This action was approved by the Board of Directors and over the
long haul has been a vital service in emphasizing the philosophy
that every individual is important and has contributed to the image
of a healthy, active community.

In addition, other administrative offices were created, staffed by
administrative personnel, such as Health and Welfare, Community
Activities and various service agencies.

As mentioned before, importance was placed on the need for sound
communications with and between the residents, as well as between
board members and staff. This was recognized by the Leisure World
Foundation through the establishment of the “Leisure World News”
at Laguna Hills. A local newspaper staff was employed early in 1965
headed by Carlton J. Smith, editor. He in turn reported to the Chief
Editor at the headquarters of the Foundation who was Mrs. Vera
Houdyshell. The News was financed entirely by the Leisure World
Foundation and distributed to all residents each week.

Reporting of official news had high priority, followed by news
relating to clubs and organizations, reflecting the great variety of
activities available to all residents. Special columns were published
as well as schedules of meetings and both formal and informal affairs.
It was an in-house organ and opened up areas of open communica-
tion with its readers. Thus Robert Price began a column with the
first issue under the title “Memo From Your Administrator”, which
ran until 1977. It did a magnificent job in informing people of the
complex workings of the community and of various policies and
procedures each resident should understand. All of this was grist to the mill of good communication.

Likewise, another means of open communication developed with the opening of Channel 6 (closed circuit TV) which was owned by Leisure World and began to broadcast in 1966. Regular broadcast of news of local affairs by the studio staff was supplemented by various programs, forum discussions and live interviews on topics important to the community. Channel 6 is even more important today in its live broadcasts of GRF board meetings and those of the Mutual boards. Its re-broadcast of meetings and question and answer discussions add much to alleviate wild rumors and speculation which otherwise would no doubt ensue.

Need for Better Communication

Even more direct open communication between governance, management and the people was needed than was found in news articles, "Letters to the Editor" or TV interviews. This was attained through the policy of having all regular board meetings — both GRF and Mutuals — holding open meetings with residents invited to participate in open discussion of policies and decisions. Procedures dictated the regular board session first, followed by open discussion with questions and answers freely given.

From this came several interesting developments. One of these was the emergence of a small dedicated group of residents known as "The Fact Finders" who would attend all GRF board meetings and sit on the front row. They were the "watch-dogs" for the people and dominated the question and answer period to the point that some sessions became quite involved and tense. In other instances some good suggestions were made and constructive criticism led to board action in the interest of good government.

Out of this came the decision to hold an open meeting of GRF in the theatre of Clubhouse 3 once a year and there discuss mutual problems of interest to all and answer questions from the floor. There was some doubt in the minds of some directors concerning the desirability of such a meeting, but under the President of GRF, Dr. Tracy E. Strevey, the first such meeting was held in the early fall of 1971. Nearly 3,000 people came and filled all the rooms in the Clubhouse. Not all questions could be answered in the allotted time, hence for several weeks Dr. Strevey ran a column in the
"News" giving answers to all unanswered questions.

One result was the setting of a precedent for an annual open meeting that has been followed since that time and secondly the gradual slipping away of the "Fact Finders" who evidently found no need to continue their activity on a regular basis.

However, as clubs and societies multiplied, issues coming before the governing boards involving any one of the several clubs brought scores of members to the regular board meetings. Matters coming before the Board concerning golf would bring crowds of golf club members to the meeting, ready to argue their position. The same would be true of the shuffleboard club, lawn bowling, tennis, bridge playing, swimming pools and down the list of a host of clubs. The input from such pressures often turned the tide in decision making, but it was Leisure World democracy at work and fitted into the pattern of cooperative living.

In recent years people who questioned various aspects of community management and board decisions organized under the name of "Community Association" and by 1976 had about 100 members, increasing to about 3,000 at the present time. Unlike the earlier "Fact Finders", the Community Association became a bonafide organization with official by-laws, elected officers and regular meetings.

The details concerning the work of the "Community Association" are found elsewhere in this book. However, it should be pointed out that one result was the entrance of "politics" into the management process. Prior to this time, both Mutual and GRF elections were quiet, matter of fact affairs with little or no campaigning or organized pressure tactics. Enter the "Community Association" under the presidency of Ed Hoffman.

"Meet the Candidates" meetings and forums were established for residents to participate in the give and take of open discussions. Endorsement of candidates next appeared, teams of Association members interviewed the candidates, and the Association urged certain preferences. As in other instances, these actions led the various boards to begin holding forums and "Meet the Candidates" meetings on their own. Thus, while politics entered the picture, it led to wider knowledge and interest in the governance process.

The appearance of these and other organizations reflect the desires and involvement of various groups of residents in the affairs of the community. While disagreements have been strident at times, a
growing maturity in approaches to self-government has brought greater understanding and mutual respect among these segments of Leisure World’s diverse population.

**Basics of Contemporary Management**

The stipulation of FHA that there must be a management company rather than a single person in charge gave the community a special financial and political stability. No corporation except the management company was, or is, responsible for the total community. Even though it has no policy making authority, it does have a high degree of responsibility in the recommendation and formulation of policies.

As originally planned, there were to be sixty mutual corporations. This would have created a “monster” with 240 directors on the sixty boards plus Golden Rain. Changes had to come and these took the form of consolidation, eventually reaching the present three in number. In this process of consolidation, Attorney William F. Price, a corporation lawyer and counsel for all corporations of the community was the guiding expert.

First Laguna Hills Mutual was formed in 1968, thus consolidating Mutuals 1 through 8 and 10. This set the pattern for future across the board action. At one time management had the task of supervising the affairs of nineteen active corporations with ninety-nine directors. The ability to lead and coordinate so many separate units of governments was a tremendous load. It was therefore determined that instead of a score or more of small Mutuals it would be much more efficient to consolidate them into much larger geographical units. This was accomplished by Board action in cooperation with the residents participating in making final decisions.

**Problems of Consolidation**

Not all attempts to consolidate were easy to accomplish. An example was found in Mutual 15 which had been organized in December 1967. Herman Lynch was president and bitterly opposed to consolidation. At that time mutuals were considering the precedent set by Mutual 1 and proposing Mutual 2. Lynch refused to put the subject on the agenda. In fact, he ran all meetings of the board in dictatorial fashion. Despite the resignation of one member and
appointment of another, Lynch continued to block discussion of consolidation.

In response, Mutual residents began to arrange informal meetings and finally acted to get proxy approvals to put two members on the board. Les Matthews and Cliff Smith were approved by 89% of the residents, but at the annual meeting in 1968 where the proxies were presented, Lynch tore them up and refused any consideration.

Immediately, several members sought legal advice and three members filed suit against the board. Friends and residents of Mutual 15 collected funds to pay the lawyers and, incidentally, to make a contribution to the hospital. The case went to court and the residents won. Smith and Matthews went on the board and with another resignation, Irene Puhlmann was appointed a member. Consolidation followed and while this entire affair was an exception, it illustrates the ever present possibility of breakdown of leadership and resulting internal conflicts. It also represented the inherent power of the people in protecting their rights in a program of cooperative self government.

Golden Rain was to meet the changing structure by amending its by-laws relative to electing members of the board. Whereas each Mutual in the beginning chose one director, changes provided for individually weighted votes with each Mutual director having his vote given a weighting equal to the ratio of the members of his corporation to the number of members on the Board. Also, the size of the GRF Board was set at fifteen with a three year staggered term and a one year interim period before a member would become eligible for re-election.

Appearance of P.C.M.

Another change occurred in 1973 when the Leisure World Foundation changed its name to Professional Community Management, Inc. This was necessitated by the extension of management contracts with other community housing corporations, thus becoming managing agents far beyond Leisure World. It retained the same management team and the basic organization with its several departments which had evolved over the years.

Within this framework the role of the Administrator likewise underwent some revision. As Robert Price remarked he “was very honored to have been President of Golden Rain for six years”. He
held that position by virtue of decision of the directors who elected him to office. FHA had mandated that he be a member of the Board, but not necessarily as President. However, the question began to rise as to conflict of interest since some of the officials of the Leisure World Foundation, and then PCM, held stock in the company. Out of this a decision was reached by the board that the President should be a resident director and thus in 1971, Tracy E. Strevey became the first resident President of Golden Rain. Price meantime served as Executive Vice President for a short time and then the office was eliminated and the Administrator became merely a consultant when needed.

Meantime, upon the recommendation of the Arthur D. Little report which had been commissioned by GRF to study management and recommend changes, the name of the Leisure World Administrator was changed to General Manager, the one person to be the coordinator of all departments.

Overview

It can be truly stated that sound techniques of good management, resident participation in governance and cooperation at all levels did evolve at Leisure World, Laguna Hills despite the great complexity of a fast growing community destined to reach a population of approximately 22,000. Much had to be learned through experience and exploration of methodology.

Maintenance management, recreation coordination, security, procedures, financial techniques, transportation efficiency, and leadership skills were all brought together and perfected in this unique community.

A number of areas were kept in balance due in large part to the dedication of both residents and the management team. Leadership from both groups was self evident. Even when the cooperative aspect of building by Rossmoor was changed to condominiums, little effect was felt in the governance and cooperative aspect of life in Leisure World.

New problems in a new time arise and will continue to challenge the leadership qualities of all concerned. The relations with other communities outside the walls of Leisure World, the issue of "incorporation as a city", the problem of the use of El Toro Marine Air Base by commercial aircraft, traffic congestion related to new
developments within and around the Leisure World complex — all these and more — confront boards of directors and community residents.

A glance back over twenty-five years of outstanding success in attaining the stature and maturity of Leisure World today leads to confidence in the future, for solutions will be found and progress will continue in the interests of those who live in the beautiful environs of a retirement dream.

Governance as developed at Leisure World, namely self-governance and leadership, can now be viewed as a basic structure around which the total lifestyle of Leisure Worlders can be understood. Here emerged the vehicle for initiating and guiding the various components of living involved in the continuing fulfillment of retirement dreams. This leads to the next chapter which deals with the scope and range of activities which have been made available and are enjoyed by Leisure World residents.
Leisure World
ORGANIZATIONAL RELATIONSHIPS

BUILDER / DEVELOPER

GOVERNING BODIES

MANAGING AGENT

GOLDEN RAIN FOUNDATION
Community Wide Facilities & Services

AGREEMENT

MUTUAL HOUSING CORPORATIONS
Residential Matters

AGREEMENT

ROSSMOOR CORPORATION
New Sales And Warranty Obligations

AGREEMENT

PROFESSIONAL COMMUNITY MANAGEMENT

SECURITY

MAINTENANCE

LANDSCAPE

RECREATION

FINANCIAL

HUMAN RESOURCES

MANAGEMENT INFO SYSTEM

COMMUNITY RELATIONS

TOWERS

ADMINISTRATION

GENERAL MANAGER

FORMED
# LEISURE WORLD CORPORATIONS

<table>
<thead>
<tr>
<th>Corporation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOLDEN RAIN</td>
<td>Operates community facilities such as clubhouses—golf courses—recreation vehicle storage—garden centers—mini buses—security</td>
</tr>
<tr>
<td>UNITED LAGUNA</td>
<td>Non-profit cooperative housing corporation. Owns and manages all real property within original 21 co-op mutuals</td>
</tr>
<tr>
<td>THIRD LAGUNA</td>
<td>Non-profit condominium housing corporation. Governs maintenance of common area within boundaries</td>
</tr>
<tr>
<td>TOWERS (50)</td>
<td>Non-profit condominium housing corporation. Special in-house services. Manager on site</td>
</tr>
<tr>
<td>P.C.M.</td>
<td>Community and property management company contracted as sole agent—employs personnel to fulfill contractual obligations</td>
</tr>
</tbody>
</table>
An Active Community

JOINING

In the Fall of 1964 people from "elsewhere" moved into this new seniors community. They brought with them years of experience and participation in their former cities, towns and countries. Here they were the pioneers who had the opportunity to apply all former experiences to make this new life style one of constructive interactions, opportunities to make new friendships and to improve the new community.

It happened so naturally. Two men met at a newcomers' dinner. In the course of conversation one mentioned he had so enjoyed playing in a small orchestra in the Midwest. The man next to him remembered that he too had been in a little band. This dinner conversation was the beginning of the search for others with similar experiences. Soon there were twelve musicians and a director. This was the beginning of the Leisure World Entertainers, subsequently, the Leisure World Orchestra. This group practiced diligently and within a short time was providing entertainment for other newly formed organizations.

Clubs and organizations were forming overnight. Some of the earliest were Men's and Women's golf clubs, Masonic Club, P.E.O., Woman's Club, Stars, Investment, Republican and Democratic Clubs. Practically every state, Canada, and Latin America had social clubs to bring together people from "home" for fun, friendship and service.

No houses of worship were built in those early years but church denominations met at Clubhouse 1. These meetings soon formed into their women's guilds, men's and women's groups and branches of national religious organizations.

By 1966 more than 100 clubs had been organized. During the early months the only place for them to meet was Clubhouse 1. The rooms were also in demand for special programs which the clubs wished
to present — such as fashion shows, concerts, plays, lectures, etc. Clubhouse 1 was booked from morning to night. The Education and Recreation Department had to set regulations for the formation of clubs. These included approval of the clubs’ by-laws, which had to be presented for proper recognition and official status, plus a complete membership roster. Only then could room reservations be made.

In addition to the regular meetings, most of the clubs sponsored one or two special events during the year. These included annual catered dinners, book reviews, and stage programs. Some of the events during the first year were an Easter Bonnet Tea sponsored by the Woman’s Club, and a Stamp Club Show which was the first in the United States to combine stamps with a “See America First,” with a display of stamps’ First Day Covers. There were tea parties, golf tournaments, a minstrel show, book reviews, speakers and travel shows.

During 1965 and 1966 clubs wanted qualified speakers concerning the new program, Medicare. There were many meetings devoted to this, answering the array of questions on the subject. The administrative staff of Leisure World was called on often to explain the operation and management of this senior complex. Securing qualified speakers was not difficult. Many of the new residents had experiences and talents they were willing to share with their new neighbors. The nearby University of California, Irvine was another good source for speakers.

The colonnade of Clubhouse 1 was soon adorned with colorful plaques designating the various clubs and even giving times and places of meetings. A stroll through the walkways is almost unbelievable. How could so many clubs be organized? The originality of many of the plaques catches the eye.

Clubhouse Expansion

Clubhouse 2 was opened and more rooms were available for the use of the residents. More clubs were formed and there were more requests for rooms for meetings and special events. The Education and Recreation Department had to establish a new system for room reservations. Clubs were asked to plan their activities and needs for reservations a year ahead of time. On July 1st of each year, clubs sign up for room space for the coming year. This practice was most successful and is still in operation in 1989. Clubhouse 3 was
completed in 1971. This clubhouse was most important to the clubs and organizations. It provided more meeting rooms, a rehearsal room for the Theater Guild and musical groups, and most important was an auditorium with a seating capacity of over 800 with excellent staging facilities. Now the large clubs could hold their meetings in the auditorium. Now all clubs could sponsor excellent programs of music, dance and outstanding speakers for their membership and also for the community at large. For example, the Woman's Club first program in the new auditorium attracted a sell-out crowd for the dance team of Bobby and Cissy of the Lawrence Welk TV show.

In May 1973 Clubhouse 4 was opened. This was the Arts and Crafts Clubhouse and bridge facility. This, too, provided more classrooms and meeting rooms for those clubs related to such activities, especially crafts and hobbies.

Clubhouse 5 when completed had rooms large enough for 500 at a sit-down dinner, with a stage to accommodate more programs.

New clubs continued to be formed. It has been said that when two or three people gathered, another club was in the making. The number grew until there were more than 200 clubs with meetings and special events. It was a very active community with heavy daily schedules of events. Some clubs had membership of over 700 and still continued to grow. Many residents belong to five or more clubs.

As a result of rapid growth of clubs, the Education and Recreation Department organized the "Presidents Council," a bi-monthly meeting of the club Presidents or their delegated representatives. At these meetings problems, new regulations and an exchange of ideas became a most effective tool of communication for all clubs and the Education and Recreation Department.

The clubs of Leisure World fall into many different categories. It will not be possible to list all clubs here, but a complete list is included in the appendix of this book. A few examples of the types of clubs are:

**Sports**
- Rod and Gun
- Women’s 18-Hole Golf
- Men’s Golf
- Lawn Bowling
- Shuffle Board
- Aquadettes
- Tennis

**Scientific-Electronic**
- Astronomy
- Electronics and Computer
- Aero Space

**Service Clubs**
- Kiwanis
- Lions
- Rotary
Educational
American Association of Retired Persons
Academians
Writers and Publishers Community Association
Historical Society
Foreign Policy
Political Clubs
Democratic
Republican
Men
Men’s Social
Men’s Discussion
Jewish
Jewish Federation
Hadassah
B’nai B’rith (2)
State/City
California
Chicago
Minnesota
Art
Art Association
Potters and Sculptors
Porcelain
Jewelry and Enameling
Theatre Guild
Camera
Stamp
Animals
Cat
Canine
Saddle

Women
Panhellenic
Ebell
Aliso
Woman’s Club
Heritage
American Italia
Daughters of the British Empire
Scandinavian
Games
Amigos Nuevos
Chess
Jolly Boys
Bridge
Scrabble
Benevolent
Red Cross
Salvation Army
Musical
Leisure World Orchestra
Keyboard Concert
Community Concerts
Opera 100
Leisure World Chorale
Dance
Ballroom Dance
Folk Dance
Roundaliers
Nature
Garden
Audubon Society

Club Donations

Clubs held many events to raise funds for their special interest projects within and outside of Leisure World. There were candy, fruitcake, nuts and other kinds of sales such as bazaars. Then there were the dinners, lunches, teas and fashion shows for members and guests. Tickets were sold for series of programs, concerts and other
special events. There were clubs that planned and conducted trips for their members and friends of the membership. There were trips to theaters, museums, cruises to Alaska, down the Mississippi, trips to the great western national parks. As an example the Ebell Club sponsored an average of 45 trips a year from 1971-1988. There were Bingo parties, Las Vegas Nights, Rodeos, picnics, barbecues and special Saddle Club shows. If there was a way to raise funds for their favorite project, the members always found it and got good support from the residents.

It would be impossible to list all of the club contributions to Leisure World facilities as they were so numerous. They gave organs, pianos, improvements to the stage and sound booths in Clubhouse 3. A club saw the need for handrails on the aisles of Clubhouse 3 auditorium and donated them from proceeds of the club activities. The exercise rooms were the recipients of many clubs generous offerings with stationary bicycles, treadmills, weights and other needed equipment for the physical fitness of the residents. The costs of the sound systems for the hard of hearing in Clubhouse 1, 3, 5 and 6 were largely met by gifts to the Golden Rain Foundation for this purpose. The library benefited from the clubs generosity with money for new shelves, books, periodicals, newspapers and unexpected expenses. Clubs saw a need for a bus shelter at Gate 3 for all the residents who took bus trips. Donations came in rapidly and the shelter was built. The sports clubs such as lawn bowling, tennis, golf, and shuffleboard gave money from their fund raising and surplus funds to improve their own facilities. Almost every Golden Rain Foundation meeting recorded one or two resolutions accepting gifts for improvement to Golden Rain facilities.

The clubs generosity did not stop at the walls of the community. Education was of great interest to the clubs. Thousands upon thousands of dollars have been donated for scholarships to students of the Saddleback Community College of South Orange County. Opera 100 annually gives scholarships to colleges and universities of Orange County to help young operatic singers. Universities in California and "home" state universities are included in club budgets. Some clubs have special interest universities that receive their donations. Foreign universities are not forgotten, receiving generous support from those groups who have the desire to support them. Exchange students are helped by some clubs. Youth groups throughout the country receive assistance from clubs
in Leisure World. Orange County Children’s Hospital was a favorite recipient from funds raised by teas or luncheons.

Service clubs of Leisure World and veteran’s organizations prepared kits for all servicemen leaving El Toro Marine Base for Vietnam and also “welcome back” kits for those returning. Veterans hospital and veterans services have received generous support of money and supplies.

City of Hope has had financial support throughout the years. The Saddleback Community Hospital has been a principal beneficiary of clubs and individuals of Leisure World. Others that are always remembered are Salvation Army, Shrine Children’s Hospital, Red Cross, Good Will Industries, Joplin’s Boys Ranch and Hospice.

The Performing Arts Center receives generous support from Leisure World groups interested in the arts, such as the Orange County Philharmonic Orchestra and Opera Pacific. The contributions that clubs and organizations have made to hospitals and other institutions throughout the United States and overseas are too numerous to mention.

Over the years the number of clubs has fluctuated. There has been consolidation of some, others have disbanded as population changes dictated, new clubs are organized from time to time, but the count has remained high. The number of clubs currently is 189.

Leisure World Library

Leisure World clubs provide a source of friendship sharing and giving for their members. Their contributions to their community and outside world is outstanding. Residents join to make new friends, to be entertained, to learn, to increase skills and understanding but they also serve. The spirit of the clubs was to serve the interest of their memberships, their community and Saddleback Valley. All clubs cannot be mentioned but one seems to typify all these outstanding qualities. This is the Panhellenic Club representing Greek letter sororities in membership and was one of the earliest clubs to organize. In 1966 its president cited the need for a project for the club and suggested that a library within Leisure World could be a most worthwhile project. The membership enthusiastically approved the project.

The club had limited funds. They did not know where they could locate a library. They turned to Golden Rain Foundation for
encouragement and physical space. Golden Rain Foundation provided a small room in Clubhouse 2.

The Leisure World News published an appeal for workers and book donations. Trained librarians who were now Leisure World residents volunteered. Books came in bags, boxes, and some cartons right off the moving vans. Hard work by members of the club and other volunteers enabled the library to open on May 9, 1966, with over 3,000 books on the shelves.

The library now had space, books and volunteers but no money. Golden Rain Foundation provided a monthly contribution for books. Panhellenic gave financial support. Residents were urged to buy books as memorials to loved ones.

By 1968 these small quarters were outgrown. Again a request was made to Golden Rain. The old snack shop behind the administration building was rejuvenated with heating and cooling facilities, carpeting and furniture. Many hours of hard work enabled the new quarters to open on May 5, 1969. By 1974 this second location was far from satisfactory. If Panhellenic and all the other library volunteers were to truly serve the community, a permanent building was a necessity. Again an appeal to the Golden Rain Foundation brought an appropriation of $265,000 for the library in late 1975.

While the building was being built, the library was housed in two trailers. Because of a ground condition that necessitated a costly revision in plans, the new library had no money for new shelving. No way could there be old shelving in a new library. An appeal went out to residents and clubs. Within six weeks, clubs and individuals had contributed over $18,000 to support the library financially and with volunteers.

The library now accommodates nearly 20,000 books. There are special books for browsing, periodicals, newspapers and large print magazines for visually handicapped. The library has a collection of more than 25,000 paper backs that can be borrowed in quantity. It also has a fine collection of "large print" books, and cassettes for those with visual handicaps.

Duplicate books are given to schools, universities, recreational centers, nursing homes, veteran's administration hospital, other hospitals and El Toro Marine Base. About 62,000 items are given away each year. Today this library has over 65,000 visitors a year. Over 20,000 hard cover books are circulated. Hundreds upon hundreds of paperbacks are given out. Jigsaw puzzles are an ever
attractive item for checking out. Newspapers and periodicals are available for reading in the library. It also provides a special place where one can go and just be quiet and think. Even today Panhellenic still stays active in serving the library started so long ago. A member serves on the Board of Directors, the membership furnished volunteers and regular financial contributions. They joined — they served.

PLAYING

The new resident thought that he had moved into “Golfers Paradise.” An 18-hole course and a 9-hole course. No long travel to get to the club, no long wait for sign-ups. It was free. What more could any golfer ask? Soon some changes had to be made in this paradise. People who had never played golf were coming out with one or two newly purchased clubs. What they did to the course was not to be discussed in mixed company. The expenses of repairs soon made the Education and Recreation Department ask the Golden Rain Foundation to limit play to experienced players. As the community grew so did the number of golfers. To keep the paths, greens and the entire course in excellent condition, a small fee was charged. This did not deter the golfers. In 1987, 61,017 played the 18-hole course and 54,757 the 9-hole course. There were about 8,000 guests playing these two courses. Many residents drove balls on the driving range. In fact 27,898 drove practice balls. In later years a Par 3 course was added. This too got excellent usage and 26,812 residents played the Par 3 course here in 1987.

Swimming was a most important part of one’s recreation activity. Some swam for exercise, some for relaxation, others for a time to swim, sun and meet new and old friends. Leisure World has four olympic sized pools with hot pools and one smaller pool. In 1987, a total of 159,411 people used the swimming pools for exercise and recreation.

Leisure World seemed to be made up of dancers. These were the ballroom, folk, round and square dancing groups. They met for instruction, practice, just plain fun and to perfect routines that they would use to entertain groups within Leisure World and at nursing homes, schools, conventions, etc. throughout the county. In the year 1987 approximately 38,000 residents participated in one of these four forms of dancing.
The lawn bowlers in their white garb are very serious about their game. They enter into tournaments with other senior communities. The two greens at Clubhouse 2 and the one green at Clubhouse 1 are active in all good weather. In fact, 24,065 residents played on one or the other of the lawn bowling greens.

Bocce Ball attracted another group of residents. They played their games at Clubhouse 1. They had their social club and social functions as well as their exercise. 2,250 took part in different games in 1987.

Exercise is fun especially if you do it with others. This is certainly true in Leisure World. In 1987, as many as 78,465 visited and used the different equipment facilities. These rooms were crowded and all equipment is in operation all the time. Then there were the 54,449 residents who took classes and other activities in the mini-gym. What a noisy, happy, healthy group, playing and keeping fit at the same time.

For others who wanted to learn and practice their skills at billiards, there were well equipped rooms at four of the clubhouses. One could always find a game in these well equipped rooms. In 1987 men and women residents frequented these billiard rooms almost 59,000 times.

Clubhouse 1 has a table tennis room that was used by 11,896 residents throughout the year 1987. They, too, have regular tournaments for local players and for those players who compete with players from outside areas.

Shuffleboard is a very popular source of good fun and friendly competition. New residents unfamiliar with the game are given instructions by members who are experienced players. The shuffleboard courts at Clubhouse 1 and 2 are covered and air conditioned. Every day one can see men and women heading towards the courts for a friendly game, chat with friends and a cup of coffee. A total of 33,392 men and women enjoyed the courts last year.

Many residents of Leisure World enjoy the experience of growing their own vegetables or flowers at one of the garden centers. The satisfaction they receive from harvesting a good crop before the rabbits feast is so apparent on their faces as they share the produce with fellow gardeners and other friends. It is a joy to stroll through the two garden centers and see the pride that the residents take in their plots. Last year hundreds of residents grew fruit, vegetables and/or flowers in the two garden centers.

There are not many senior centers where you can bring your own
horse and have him well cared for as in the Leisure World stables. There also are horses available for residents who do not have their own horse. The riders go out on the trail for their exercise. They also have drill teams and entertain residents and guests. The stables are also known for their excellent barbecues. 4,813 resident riders used the stables last year. The number of times the riders who own their own horse used the facility was 14,877.

The planners who designed Leisure World did not feel that tennis would be in great demand and only two courts were built. These were so crowded and there was continuous demand to provide more courts. Then two more courts were built plus a clubhouse area and the foundations for two more courts. Finally, in 1985, the last two courts were completed. The tennis club is very active. Last year 40,220 people played on Leisure World tennis courts.

Playing, getting one’s exercise, belonging to a sports group has always been an attraction to new residents. The numbers show that all the facilities are used by active residents.

**LEARNING**

In 1965 the newly arrived residents found themselves with additional leisure time. They soon made an appeal to the Education and Recreation Department for some classes. They wanted to explore new fields. It is interesting to note that most requests were for classes in different hobbies. Residents wanted an opportunity to work with their hands. In 1965 an instructor in painting came from Laguna Beach and had 30 students in beginning and intermediate classes. Other hobby classes were taught by residents.

The Education and Recreation Department contacted the Tustin Unified School District and arrangements were made to have adult education classes taught in Leisure World. Each class had to have 15 registered members. For a fee of $5.00 one could enroll in as many classes as the resident wished to pursue. Some of the first classes offered were in Color and Design, Dressmaking, Lapidary, Mosaic, Oil Painting and organ lessons. In all there were 42 different classes with an enrollment of 500 students. Residents of the Tustin Unified School District could sign up for classes in Leisure World but very few did. For those who did, special security passes were issued.

As the population grew so did the interest in learning. In 1966, 750 residents packed the main lounge of Clubhouse 1 to sign up
for 47 classes. The adult education program grew so rapidly that the Tustin District provided a full time superintendent just for Leisure World.

When classes were first being considered, the Leisure World Administration shied away from exercise programs on the advice of the local doctors. Doctors said any exercise class must be well supervised. The Tustin system was not able to do this. In the meantime a research project conducted under the auspices of U.S.C. Gerontology Center set up a form of exercise classes. Three times a week residents from ages 52-87 met in Aliso Creek Park to participate in an exercise program. This unstructured program lasted almost four years and demonstrated clearly that an exercise program was most beneficial to the health and welfare of senior citizens.

Demand For Continuing Education

The Tustin sponsored program grew so rapidly that fees were reduced from $5.00 to $3.00. More people enrolled in classes as the population of the community grew.

The Saddleback Valley also was growing rapidly. In 1973 the school district divided into three sections — Irvine, Tustin and Saddleback Valley. In the Summer of 1973 Saddleback Unified School District sponsored 34 classes. In September 1974 the program had grown to 70 classes. Crafts were still very popular but residents also wanted to expand their minds in other directions. There were classes in philosophy, foreign languages, income tax preparation and investments.

Saddleback Community College also was beginning to offer some other courses at this time. As the college expanded it began to attract more Leisure World residents in higher level courses. Residents drove to the college campus in Mission Viejo. Eventually the college began to offer courses in church facilities in and around Leisure World.

1978 was a year of decision for adult education in Leisure World. The Saddleback Emeritus Program was two years old. Over 2,100 were enrolled in the Emeritus Program college classes. The college wished to expand the program within the walls, but Leisure World could not have two competing programs in adult education in the community. This was settled in June, of 1978, with the passage of Proposition 13. This legislation necessitated cutting corners on many educational projects.
In 1978 the summer educational program was one of turmoil. Saddleback Unified School District could not afford to continue the program. Saddleback College had not yet said "yes" to providing classes within Leisure World. Professional Community Management and Golden Rain Foundation adopted emergency measures to keep classes operating during the summer. A modest fee was temporarily instituted while solutions were explored.

In August it was apparent that Unified School District could no longer handle the load of 140 classes in Leisure World. The school district turned over the responsibility of the program to Saddleback Community College.

The new program under Saddleback Emeritus Insitute began in September, 1978, without fees. Ninety classes were offered. The reduction in the number of classes was offset by combining beginning and intermediate classes.

The college had different ideas about the types of classes to be offered. There were different qualifications for the instructors teaching under the auspices of the college. The college said the Emeritus Program would offer recreation and exercise programs but were not going to get involved with hobby programs.

Another concern was that in offering college programs within Leisure World more outsiders would be attracted, as all the programs had to be open to residents of the district. However, the programs offered in Leisure World were and would continue to be publicized only in the Leisure World area. Class enrollment also begins earlier for Leisure World residents and classes fill up fast. Those who attend classes from outside are carefully monitored by security. They receive a pass allowing them to attend only the class or classes they are signed up for. They can arrive no more than 15 minutes before class and leave no more than 15 minutes after class.

Another important change took place when a council of senior citizens was appointed. They decided on the courses to be offered. The residents were now involved in the determination of the kind of courses to be available.

Many changes have occurred over the years. It is no longer necessary to arise at four in the morning to stand in line to obtain a registration card. Now most residents register by mail. They are then notified if they are admitted to the class or classes. Registration is now on the computer and is so much faster and easier. If a resident is notified that a class is filled he can still go to the first
class to learn if there are any cancellations.

The Education and Recreation Department continues to sponsor classes in such fields as bridge, ballroom dancing, line dancing, etc. There is a fee for these classes. The classes that grew most rapidly were physical education and fitness. In 1978 there were thirty periods of exercise and conditioning. It continued to grow with sixteen two-hour classes, all different, with over 2,000 students taking part. New facilities were needed and in July, of 1980, a new mini-gym was dedicated. This enabled new classes to be offered.

At the present time there are 65 classes being offered in Leisure World by the Emeritus Institute of Saddleback College. The largest number of classes offered was 73, but was gradually reduced in the last five years due to parking problems at Clubhouse 4. It is interesting to note that fourteen instructors are residents of Leisure World.

The type of classes offered has changed over the years. As an example, there are classes in Computer Information Sciences, Geology, Gerontology, Health Science, Music, Philosophy, Physical Education and Fitness, of which the latter is still the most popular.

Many residents take classes for credit in Leisure World and also at colleges and universities in the area. Some are completing degrees started many years ago. Some are attending to acquire new knowledge, new skills and others to just stretch their minds. They learn — they expand their minds.

ACHIEVING

When she was touring the clubhouse as a prospective buyer, she saw a stitchery class in session. Then and there she decided she wanted to live here and learn to do stitchery. Shortly after moving in she enrolled in a class and after two semesters completed a wall hanging with over 100 different kinds of stitches made with an array of various colored yarns. This wall hanging still hangs in the residence even though the achiever has died.

Many of the residents who moved to Leisure World had a deep desire to try something they had never had a chance to do because of time or location. Many had a desire to paint and in the early years of Leisure World the art gallery was in Clubhouse 1. Here the new resident took classes and had the thrill of putting that first brush stroke on canvas. Others tried undeveloped skills at lapidary, jewelry, ceramics or wood working. The sewing room attracted many who
had never tried to make a new dress or suit and now with the help of good instructors could proudly wear a dress made from scratch. Each year an arts and crafts exhibit was held for all the residents and guests. It was one of the highlights of the year. A visitor could not believe that many of the items displayed were made by residents who had worked in their craft for only a short time.

Accomplishments

Clubhouse 1 had limited space and the equipment was inadequate. In 1969 plans were beginning to develop for an arts and crafts clubhouse and center. People interested in the various arts and crafts worked with the Capital Improvement committee to express their needs. After many delays and a great deal of resident input, Clubhouse 4 was opened on May 14, 1973, after five years of planning and building.

There is still an art gallery in Clubhouse 1. Classes are still conducted there. Clubhouse 1 also has an electronics and short wave radio room that was used by 2961 residents during 1987.

In Clubhouse 4 residents can pursue almost any hobby they wish to experience. The beginning painter can work beside the established artist in the art studio during times classes are not in session. In another section a sculptor is practicing his skill or learning a new skill. Completed paintings and drawings are displayed in clubhouses and offices within Leisure World and in public buildings in the outside community. In 1987 residents used the art gallery 11,573 times in Clubhouse 4.

The sewing room has been very popular. There are both skilled seamstresses and residents who must learn to thread the bobbin. The resident who did not move her sewing machine can do her mending here. 21,606 people used the sewing room in 1987. The yearly fashion show displaying the creations made by the residents is a big attraction.

Every Leisure World resident seems to own one or more cameras. Residents travel a great deal and take many thousands of pictures. Through the camera club residents have acquired a new skill. They have learned to develop pictures, and enlarge them. What joy when they can produce a slide show from the picture taken on that last tour. 27,969 residents used the photo lab in 1987.

A man said he was always fascinated with exhibits at county fairs that showed people creating beautiful pieces from clay. Now he had
a chance to learn and create. Classes and time spent in the ceramics studio enabled him to bring his dream into reality. The pride that the creator takes in a simple vase or an elaborate professional piece is evident to any visitor to the studio or to an exhibit. 20,787 used the ceramics studio in 1987.

The slip casting studio in connection with the ceramics studio served over 14,828 residents in 1987.

It is most impressive to visit a jewelry class to see the different designs being drawn by the students. Often there is a discussion of what stone or metal to use. There is the cutting, the polishing and finally the joy of seeing the finished project. For many it is the first time they have made a piece of jewelry. An observer can detect many pieces of jewelry made in the studio that served 17,182 in 1987.

Here is a neighbor who has been a rock hound for years. He knew nothing about the different kinds of rocks but become fascinated as he listened to a friend talk about his hobby. He went with him to the lapidary shop one day and became addicted. Now he too is a rock hound. He has learned to collect, cut and polish stones. He has taken classes and worked long hours in the lab. He like many others has a great feeling of pride in his accomplishments. 18,178 used the lapidary shop last year, including both the skilled and the novice.

In the woodworking shop one gets that wonderful smell of freshly cut lumber, hears the buzz of the saws, sees the painstaking work of putting a doll house together. The creators with wood may turn out a very simple foot stool or a most intricate carved mantel piece. Many residents donate woodworking equipment they had in their garages or basements in previous homes. It is not unusual to see a lady learning how to use the saw, the hammer, the chisel and the glue. In 1987 as many as 14,828 used this popular workshop.

In all of the hobby rooms there are volunteers on duty to help. They give so much to those who want to practice the new skills they are learning in class.

With their hands they achieve the dreams in their minds eye.

CARING

The “move-ins” were all settled in their new homes. Furniture

1. A Leisure World story is to the effect that a rock hound is a man who goes out on the desert to collect rare rocks for his lapidary use. He has a pocket full of marbles and as he finds a rock he puts down a marble. Soon he has a pocket full of rocks but has lost all his marbles.
was all in place and shelves well stocked. Not too many chores to do in a spanking clean new house. They joined a number of clubs, played golf, and took a class or two, yet something seemed to be missing. They felt they had so much, a great place to live, years of wonderful experiences behind them. These new residents wanted to share their experiences and spare time with worthwhile projects.

A call came to a Woman’s Club officer. Had any members of her club had any experience with youth groups? Girl Scout troops in the Saddleback Valley needed leaders. The response was immediate. Grandmothers who had Scout and Brownie troops experience came forward. The girls and the leaders both had fun and learned together. One resident said she never thought she’d be involved in another cookie sale but here she was again.

A father in El Toro met a Leisure World resident at a gas station. In the course of conversation the father told his new acquaintance about the trouble he was having in getting sponsors for the newly formed Little League. Too many of the fathers worked in areas far from the valley and got home too late to be of help to the teams being formed. “Give me your telephone number. I’ll see what I can do.” This resident happened to be a member of the newly formed Kiwanis Club. At the next meeting he told of the troubles of the Little League. Members said that the project sounded like fun. They decided to become a sponsor of the team, the El Toro Angels.

Members of the club attended practice, helped members of the team. They also attended all games and gave support to the young lads trying so hard to hit and field the ball. All had a great time. There was advice, practice throws, lots of laughs and some treats. At the end of the season the Kiwanis Club had a dinner in Leisure World not only for its team, the El Toro Angeles, but for all six teams. It is interesting to note that a member of that first El Toro Angels team is now a member of the Leisure World management staff.

These two examples were just the beginning of the joining of people to meet needs big and small within their community and the outside world.

**Volunteers Are Everywhere**

The Braille transcribers are an excellent example of this spirit of
Opening Day, Sept. 10, 1964. The ribbon about to be cut (above); the one and only bus ready to take the first residents through the gate. (l. to r.) Security Chief "Mac" Barber; first residents, Col. and Mrs. Fred Zimmerman; Administrator Don Gardner; second residents, Mr. and Mrs. Fred G. Klatt, and Official Hostess Ivy Barber, still (in 1989) here in Leisure World. A view (below) of Clubhouse I and construction underway within Gate 1 on that day.
Within a year after that momentous opening day, a striking monument to Leisure World's expansion appeared — the "Taj Mahal" (above) Rossmoor's "World Headquarters." It's location is shown below (center) with new business buildings appearing, a bank, the fire station on the far right, and the "Globe" encircled, just above a corner of the I-5 freeway.
First (Jan. '66) GRF Board (above) with representatives of 8 Mutuals; front row (l. to r.) Claire Ditto, Harry Manor, Elsie Parker, Ves Hall, Bernie Ingram; rear: Doug Kranten, Administrator Bob Price, Don Pelton, John Bramhall ready for first meeting, while (below) bicyclers enjoy a tour of the pathways.
Springtime exercise (above) in the shade of the ancient Sycamore tree in Aliso Park, a favorite rite of many early residents, now augmented by the more accessible exercise classes in the mini-gym. The dedicated group (below) of resident bus drivers had expanded to more than 20 by 1971, still driving the original (and popular) candy-stripe buses. Some in the group will be recognized as current residents.
GRF purchase of the golf course from Rossmoor was a time for rejoicing as GRF Pres. Strevey and Golf Club Pres. Jack Pas (above) started the festivities over the now fully developed 27 holes (below) that gave residents the advantage of a beautifully rolling landscape of trees and shrubs — and sand traps.
Leisure World is well served by religious faiths, their nearby structures having taken advantage in the first years of the offer of free sites. Built in the mid-1960's, their architecture tended toward the use of soaring towers reaching upward to the clouds, as shown by St. George's Episcopal Church (above), Geneva Presbyterian Church (upper left) and Lutheran Church of the Cross (upper right).
helping others. Men and women spend hours learning how to use the machine that types in Braille in order that the blind can read. There were two transcribers who worked so diligently to keep ahead of a graduate student who needed a new textbook in order to complete work for his degree. The volunteers each took ten pages and typed material they did not understand. Pages completed were sent to the student. Finally the book was finished and then came that wonderful feeling knowing they had helped a blind student get his degree.

Volunteers keep the Leisure World TV Station Channel 6 covered eight hours a day, five days a week. Each trained volunteer works a four-hour shift each week, some are on the air giving up-to-date information of what is for sale on the popular program "Trading Post." Other volunteers man the busy telephones, others act as hostesses to the guest appearing on a Channel 6 program. They are a very important cog in the well-oiled operations of the station. Their smiles and pleasant attitudes contribute a great deal to the success of the station.

We would not have an Historical Society if it were not for a few very foresighted individuals who felt the need to preserve the records of this senior complex. Through interested board members and volunteers, the history of most clubs and organizations is preserved in the archives. Records of Leisure Worlders of the Month are on file. These are newspaper records of each year of Leisure World's operation. All the work in keeping the files is done by volunteers. The office is also staffed each weekday afternoon by a volunteer.

The hours that men and women give to their church or synagogue cannot be counted as there are so many. In Leisure World they work diligently to raise the funds for their places of worship. They serve on committees, on the telephone committee, or they work at any job they are asked to do. They sing in choirs, they are Bell Ringers, some are superintendents of the Sunday schools, others are on the hospitality coffee service. There are the friendly visitors who call on the sick and on those who have lost a loved one. Many belong to sewing and craft groups who make needed items for missionaries.

Leisure World has a Senior Citizen Center just outside it's walls. The director of the center reports that they would not be able to serve the many seniors if it were not for the many hours that Leisure World residents donate to the success of the program. They help in the kitchen in preparing lunches. They assist with the serving,
others help with the delivery of meals to the homebound. They call the numbers for bingo. They assist with other games. There is not a job that they will not do. They bring with them laughter and smiles as well as their willingness to serve.

Other residents volunteer at the Adult Care Center where the physically and mentally handicapped can spend a day or more to free their caretakers. Again the smiling faces, pleasant voices and well trained hands help the professional staff.

Service On Official Boards

Leisure World would not be as successful as it is today if it were not for those dedicated volunteers who have served on boards and committees all these years. These men and women not only attend the many board and committee meetings, they spend hours in preparation for the meetings. They study reports and budgets and seek advice from staff members in order to be properly prepared for their responsibilities. They also accept phone calls at inconvenient hours from a resident who has a suggestion or criticism. Their pay is in seeing that the community is well run and in as efficient manner as possible.

The nominating committees have a difficult job. They work year round interviewing residents as prospective members of the boards. There are three nominating committees — Golden Rain, United Mutual and Third Mutual. They spend hours reviewing the qualifications of candidates, interviewing them and finally presenting a slate to their respective board.

No club or organization would have been organized if men and women had not stepped forward to help organize it. Others soon joined and there were committees made up of volunteers from the membership. All clubs are successful because of the willingness of their group to share their time to make the club’s efforts fulfilled. In addition to working for their organization, most clubs urge members to share their talents and time in easing the needs of their community and surrounding areas.

If anyone visiting Leisure World has been taken for a tour of Clubhouse 4, the Arts and Crafts building, they have encountered those dedicated volunteer supervisors in the crafts, sewing and woodworking shops. These volunteers not only explain the workings of their shop but take time out to answer questions of a student or
someone who needs help with a particular piece of equipment. The volunteers contribute greatly to the success of these well equipped shops.

When the first pioneers moved into Leisure World they were a small island of population in the unincorporated area of south Orange County. Just as Leisure World grew rapidly, so did the areas adjacent to it. More and more schools were built. The Leisure World residents were urged to join VIVA. Translated this means a "Very Important Volunteer Aide." The response was overwhelming. A goodly number of the intermediate and high school classes had the help of aides who were of great assistance to the teacher and also to the students in the class. They gave that special touch and confidence to the student who needed it, gave the teacher an extra pair of hands. Saddleback School District officials and board members praised the efforts of the VIVAs. The greatest praise came to one volunteer on a hot summer day. She was shopping in the Mall when she was gently touched by a young hand. "Do you remember me? You helped me so much last year. I hope you are coming back when school starts. I need you and so do my classmates." No other recognition is needed.

The unincorporated area needed a voice to speak for it to the Board of Supervisors. The Saddleback Area Co-ordinating Council was formed, made up of the homeowners associations in the area. Leisure World housing mutuals were represented by residents who attended many meetings, studied new development plans and presented their findings to the Planning Commission and the Board of Supervisors. Many a resident spent hours one night a week going over the proposals of developers and presenting their views in writing to the county.

Volunteers served the county in other ways. They had a member on the Senior Citizen Council, airport development, transportation and many other committees. Volunteers served on a two-year Aliso Creek study team. The goal of this study was to provide open space for recreational purposes along Aliso Creek from the mountains to the sea. The plan was accepted by the Board of Supervisors and parts of it have already been implemented and other sections are being considered.

Within Leisure World many special services are offered by volunteers of various organizations. AAUW offers assistance to residents once a month to assist them in balancing check books,
filling out insurance forms, translating financial statements and any other assistance with everyday financial interpretations. Each year volunteers from AARP are specially trained in income tax preparation. These volunteers set up a regular schedule for residents who need such specialized help.

There is the Eye Mobile provided by the Lion’s Club. The Red Cross volunteers do sewing for the Orange County Chapter. The list could go on and on. Veterans groups offer regular assistance to the veterans and their families.

The Library in Leisure World — discussed earlier in this chapter — has never had a paid worker on its staff. Panhellenic volunteers put the idea of a library into being. Since then there have been many volunteers who have given of their time to make the library a most important part of the community. Keeping records for the number of volunteer hours was not important, it was more important to get the job done.

There is a story that Panhellenic decided to honor those first library volunteers with a special meeting, but a snafu developed when they realized that if all attended, the library would have to be closed. A man volunteered to keep the library open so the ladies could party.

From 1960 through 1971 no accurate record of the number of volunteer hours has been found. But in the years from 1972 through 1987 when a daily count was tabulated, the total comes to approximately 200,000 hours.

Each year at Christmas time all the library workers are honored at a luncheon hosted by PCM. Those who have tallied 1,000 hours of service receive special commendation. Those who have chalked up 2,000 hours have their names added to the plaque which hangs in the library foyer.

The Hospital Volunteers

In January 1965 the medical building was partially finished and staff was moved in. As the building was completed more doctors came on staff. Now they were ready for the medical center volunteers. The Pink Ladies started on May 20, 1965. They had twenty-five volunteers in those first months. These Pink Ladies provide assistance to the doctors and nurses and in other medical departments. In that first year they served over 750 hours. The number of Pink Ladies grew and continued to serve the Medical Center until
the Saddleback Community Hospital opened in January 1974. In anticipation of the hospital opening, the name was now changed from the Medical Center Volunteers to Saddleback Community Hospital Volunteers.

As the construction of the hospital approached completion the volunteers, outfitted with hard hats and flash lights, conducted tours of the grounds and buildings. Men were now joining the volunteers. Volunteer service was provided in the following areas: central services, coordinated home care, dietary, emergency, escort/messenger, information/reception, intensive care, lifeline, main laboratory, patient donor program, medical library, patient library, patient mail, recovery, x-ray and various other activities.

In 14 years all those women and men volunteers have given 1,126,833 hours to serve the patients and staff of the hospital. That figure does not include all the hours that the volunteers put in at the Medical Center before they became part of the in-service volunteers of the hospital. Volunteers have a monthly meeting with a guest speaker. One special meeting is devoted to special recognition for their services.

Long before the hospital opened, a thrift shop was being planned. On April 8, 1974, a rent-free centrally located facility in the former Alpha Beta Center was made available through Ross Cortese. The shop had a preview on May 11, with 30 volunteers on staff. By noon on the 13th more than $1,000 overflowed the muffin tins used in lieu of a cash register. The Thrift Shop had arrived! As it grew it had to move twice in the next five years. The number of volunteers grew rapidly. Currently the shop is located in the Saddleback Plaza. The volunteers pick up, receive, sort, price, display and sell hundreds of donated items monthly. On an average 160 volunteers in gold color smocks work 3,200 hours a month and serve 8,600 customers.

The primary purpose of the Thrift Shop Auxiliary is to raise money for the hospital. They have raised more than a million dollars from sales. They benefit from new residents who always seem to move in with far more furniture and other items than needed. Through the years the Thrift Shop volunteers have given 482,328 hours of valuable service.

The Meals-on-Wheels program was started in 1974. The Saddleback Community Hospital Board of Directors recognized the need to provide nutritious meals for residents who had no one to care for them.
for them upon discharge from the hospital. An appeal was made to the Kiwanis Club for drivers and to Church Women United for members to serve as chairman of the day and friendly visitors. The first meals were delivered in November 1974 to four clients on one route. Currently the program serves 609 clients on 6 routes. This service is of great importance to the shut-in. Sometimes the friendly visitor is the only bright spot in their lonely day. Each friendly visitor takes time to chat for a few minutes.

The Meals-On Wheels auxiliary has a membership of over 450 volunteers. They have served 646,356 hours. Drivers have driven 30,000 miles per year or 420,000 miles in 14 years. All drivers use their own cars and gasoline.

The Hospital Gift Shop was operated by the Rancho Viejo Woman's Club for over six years. In 1981 that Woman's Club found it necessary to discontinue the operation. In July, 1981, the Gift Shop Auxiliary took over. The purpose and the motto of the Gift Shop volunteers is "Heart Line to Cardiac Care." They have pledged all proceeds toward the purchase of equipment needed for cardiac care in the hospital. The red and white decorations, gift wrappings and red and white uniforms insure that the public are aware of the heart theme. The Gift Shop volunteers have worked a total of 105,512 hours.

The people who came to reside in Leisure World have joined and supported 200 clubs. They have attended a wide variety of classes and they have given millions of hours of volunteer work. It is indeed an Active Community.
VI

A Safe And Healthy Community

Health Care

Along with volunteerism, from its very beginning, Leisure World Laguna Hills, included health care. Before the first resident moved in, a physician had been engaged; he was soon joined by a registered nurse. Shortly, there was a medical unit with three doctors and three nurses located in two of the dining rooms in Clubhouse 1, plus the upstairs conference room, with a pharmacist stationed in Dining Room 2.

Benefiting by the experience at Leisure World Seal Beach, the new group instituted a plan by which the resident paid only 20% of the costs for medical services. In the late 1960's this came to $2 for a $10 prescription, $3 for a $15 office visit to a doctor. Similar costs prevailed for home visits. On house calls, each nurse carried a bag containing various medicines except narcotics, and equipment including a tank of oxygen, plus a clip board with the patient's chart, a flashlight and an umbrella.

Original plans also included construction of a medical center and a hospital. In January, 1965, the first section of the Medical Center building was ready for occupancy, at the Paseo de Valencia site. Six doctors and six nurses plus three secretaries, moved out of Clubhouse 1 to the new facility.

Their number increased rapidly, as the population of the community added scores of new members each week. Within a year, the services had been expanded to include X-ray, physical therapy, a home-maker service and a volunteer program.

The coming of Medicare in 1966 necessitated extensive additional clerical work, but the Medical Center continued with much the same personnel providing office visits and home calls. The increased number of physicians came to include some specialists, but patients' case records were kept in a central file, available to each doctor.

The head nurse during this period, Miss F. Margaret Nelson, R.N.,
who had moved from the staff at Seal Beach, has said: "Many times the home nursing services helped individuals to remain at home instead of having to go to the hospital. By having nursing care as near as the phone, the doctors on call 24 hours a day, with so many facilities centrally located in the medical building, we were able to practice preventive medicine and to provide reassurance to many fearful persons."

Health Support Services

A Religious Council of Laguna Hills had been formed among the leaders of the several churches; on February 15, 1967 a committee of that Council, at the request of the Medical Director of Leisure World, formed the Homemakers and Related Services Inc., headquartered in the Medical Center building which had now been completed. Its board of seven directors included a local attorney, a banker, the Presbyterian and the Methodist ministers, the President of the Jewish Temple, plus the Medical Director of Leisure World and the Administrator of the Leisure World Foundation.

Supported entirely by voluntary contributions, the group employed a trained director of rehabilitation who had held a similar position for five years in Santa Ana, and her assistant, similarly well qualified. They were established in the Medical Center, where they recruited suitable persons to help Leisure World people who were either temporarily or permanently disabled.

They performed homemaker services, not as an employment agency but as a referral source. Services offered ranged from practical nurse with some household tasks in addition to patient care and to homemakers with all household duties, including shopping, cooking and laundry. In addition, licensed vocation nurses were made available when urgently needed, as well as drivers, either with their own car or to drive the patient's car. For all this, the patient dealt with the helper, paying on a scale determined by the agency. This entire program was supported by donations from churches, clubs, individuals and in each of two years from a local Carnival which raised $1,337.00.

The Medical Department already had two services, coordinated home care and nursing services. After two years on an independent basis, the Homemaker's and Related Services, Inc. wrote to Golden Rain Foundation suggesting that it take over the operation, since
their functions had developed into a part of the home nursing division of the Golden Rain medical facilities. Shortly, this was done.

Hospital Formation

The services listed above continued to operate out of the Medical Center building which also housed two dozen doctors, a pharmacy, the volunteers office, and, for a time, an adult day care center.

Originally, Rossmoor had planned to build a hospital, but with a more realistic appraisal of how to build a hospital, Rossmoor asked to be relieved of any responsibility in that connection. Instead, the Leisure World Foundation, was asked to draw up plans.

With 2,000 families having moved to Leisure World, Laguna Hills, all of whom had been promised a hospital, the need was urgent. Starting with Mutual 12, the Golden Rain Foundation membership fee was increased from $500 to $1,200 to provide a reserve for hospital construction. Ultimately this resulted in a contribution of $800,000 to the Saddleback Community Hospital.

A new non-profit hospital corporation was therefore formed solely to develop Saddleback Community Hospital and was composed mostly of Leisure World people. Among its first decisions to be made was the one as to whether the new hospital should be proprietary or non-profit. After consultation with the president of the Lutheran Hospital Society of California, with the intent that it should be a fully-accredited Class A hospital, Saddleback Comunity Hospital was established as a non-profit operation.

Federal funds were then available but the end of such funding was in sight. A grant of $1,600,000 was obtained. It was a condition of this grant that Saddleback should coordinate its design with other hospitals in the area for minimum duplication of equipment. Including funds from Golden Rain, however, there was not enough to meet the building budget of $10,000,000 so United California Bank, provided temporary financing. Several years were required to obtain permanent financing, and the final cost reached nearly $15,000,000. Because of its non-profit status, any excess of revenues over expenses is required to be returned to the community in the form of expansion or modernization of facilities, services and equipment. The hospital continues a variety of fund-raising activities, as it expands its facilities and up-dates its equipment. Construction started on June 7, 1971 and the hospital opened on January 27, 1974.
Construction

The hospital corporation's board of 17 men and one woman, took an active part in the design and construction of the hospital building. With concern for possible earthquakes, some 200 holes were drilled in the earth, some to a depth of more than 100 feet, thus creating a network of steel reinforced concrete piers. Their diameters ranged from 32 to 42 inches and each contained from 16 to 20 tons of steel bars. These bars are firmly secured to each other through a unique arrangement of parallel and diagonal capping members; the whole sub-foundation was designed to protect the structure from severe vibrations that might be caused by an earthquake.

To avoid disturbing patients during maintenance work, spaces were provided between floor levels of the building — not the usual "crawl space" but high enough for workers to stand up, thereby assuring worker comfort and a minimum of the slipshod methods created by stooping in confined quarters. In addition, the working spaces are uniformly zoned so that, for instance, an electrical repair can be made in a neatly isolated zone, while work on piping has its own zone.

A continuous supply of electricity, so vital to the respirators, kidney machines and so on, is assured by a 900-kilowatt emergency generator which automatically goes on line in three to five seconds after the normal power reaches a predetermined low voltage.

Even with its steel and concrete construction, the hospital has additional fire protection with smoke detectors, automatic sprinkler systems and interior walls and partitions capable of withstanding fire up to four hours.

Growth

From its opening in January, 1974, the hospital made continuous progress and in the following year it was granted accreditation. In April, 1982, a CAT Scanner was installed in the Radiology Department; October of the same year saw an addition to the Radiology Department of a Digital Subtraction Angiography system.

1983 was a year of major developments. In January a 20-bed medical-surgical wing opened, bringing the total bed count to 175. In May, the Eye Center was opened with complete facilities for medical diagnosis and treatment of eye disorders; also in the same
month a Saddleback sponsored Urgent Care Center opened in Mission Viejo, offering medical care on a walk-in basis. In June, Saddleback became the first Orange County hospital to use ultrasonic energy in treatment of kidney stones, and in September it announced affiliation with Memorial Health Services, a Southern California health care system which includes the Memorial Medical Center of Long Beach.

1984 was scarcely less eventful. In June the hospital, now named Saddleback Hospital and Health Center, received its state certificate of need for the first cardiac catheterization laboratory and open-heart surgery unit in the Saddleback Valley. In September, the Emergency Department was rated busiest among the three paramedic receiving centers in Orange County. In December plans were announced for a comprehensive Women’s Hospital, plus remodeling and expansion of the rehabilitation unit.

The next year, 1985, saw the opening of the rehabilitation system in May. In July the Cardiac Catheterization Laboratory opened, and in September the opening of the Women’s Health Center, in the old Medical Center, while in December the open heart surgery facilities were completed.

During 1986 Saddleback Hospital introduced mobile cardiac testing, with computerized non-invasive techniques brought to doctors’ offices. The same year, in its own building, an Outpatient Surgery facility was opened, the first for a south Orange County hospital.

1987 marked another introduction of a mobile magnetic resonance unit, also the first in Saddleback Valley. The next year, 1988 saw the opening of another new building, the Family Birth Center, which provides 21 “LDRP” rooms for Labor, Delivery, Recovery and Postpartum. Each of these rooms looks like a tastefully appointed bedroom in a lovely home, but in an alcove is all the equipment that an obstetrician could require; thus, except in a few high-risk cases, each mother spends all of her hospital stay in the one home-like room. This handsome building demonstrates the extent to which the Hospital is now serving population outside Leisure World. This brought the size of the entire facility to a total of 212 beds.

During all of this expansion there had been some building on adjacent blocks, offering offices to the newly arriving physicians who served the continuously increasing population of this part of Orange County and also the established doctors who had long been...
situated in the Medical Center.

In the mid 1980s Saddleback announced that, having now become a Health Center, it would soon offer doctors' offices, and would demolish the old Medical Center to provide additional parking space.

In the summer and fall of 1988, offices became available. Some of the physicians moved into various of the new buildings, but many chose the convenience of the Saddleback building, especially surgeons for whom the hospital's operating rooms could now be reached without going out of doors, an advantage to both doctor and patient.

In October, 1988, the Medical Center was demolished, the land paved over and on November 14, there was a parking lot so extensive that a little vehicle with driver was on hand to ferry patients and visitors from car to building door.

The Associates

These progressive enlargements and improvements over the years were made possible by a strong volunteer support from the community, mainly Leisure World residents. Even before the hospital opened its doors, in 1974, a dedicated group of people walked the streets of Leisure World, going door to door to canvass the neighborhood for gifts to the hospital. Any person who made a gift of $5,000 or more had his or her name on a room in the new establishment. Three hundred thousand dollars were collected.

For several years, the fund raising efforts were under the direction of the hospital's Community Relations Committee, but in the early 1970's under the leadership of Tracy Strevey, a group named "The Associates" was formed, which continues to flourish. Each member contributes $100 a year "dues" and the majority of the 1,000 or so members attend three of four special events each year in order to raise additional money.

Further support of the hospital is provided by the Thrift Shop, the Gift Shop, and volunteers who work at the hospital.

The Associates fund-raising events began in November, 1976 with a reception which was repeated the next two years: An optional black-tie dinner was held each November, beginning in 1978, and continuing until 1982 when the November event became a "Western Round-Up". In 1984 there was a "Night at the Races", while in 1986, the standard fall benefit was held in a new continuing-care
facility outside Gate 3 named Palm Terrace. The management pro-
vided lavish refreshments for an evening of gaiety and "gambling" 
called "A Night in Monte Carlo." This proved so popular and finan-
cially successful that it has been repeated in subsequent years. At 
other times there were bowling and golf tournaments, and fashion 
shows each spring and summer, plus, each year, several special "New 
Member" parties, and health forums.

Other Fund Raising

Meanwhile, as early as 1979, a corporation had been formed, the 
Saddleback Community Hospital Foundation, with Albert A. Hally 
elected its first chairman. The Foundation was a planning opera-
tion and part of the Community Relations Committee for two years. 
In 1982 it was fully activated as the instrument for raising major funds 
for the hospital's expansion. Again, under the leadership of Al Hally, 
a successful $1.3 million campaign was completed to add 20 
medical/surgical beds to the hospital.

In 1984, the Foundation initiated a "Planned Giving Program." 
As part of the 10th Anniversary celebration for the hospital, the 
Founders' Group was formed, of individuals who pledged or gave 
$50,000 or more to the Hospital or to the Foundation. The Founders' 
Group now (1989) has 50 individuals and couples.

In 1986, the Foundation organized a "Heritage Club" to honor 
those who have named Saddleback Hospital in their wills. Its 200 
or more members are honored each year with a luncheon.

In 1987, a $5 million campaign was completed to support the new 
Women's Hospital at Saddleback Hospital and Health Center. This 
campaign, chaired by the same Al Hally, also involved the medical 
staff, the Associates, community, boards, leadership gift divisions 
and separate volunteer and support group campaigns. The Women's 
Hospital has its own Women's Auxiliary formed in 1987 and its first 
benefit effort produced $40,000 for the new facility.

In July, 1988. C.A. Schneider became chairman of the board of 
the Saddleback Health Foundation. A carefully researched and 
documented Long Range Plan extending to the year 2000 was 
adopted by the Board. It included plans for expanding the donor 
base and other steps to position the Foundation for a major capital 
campaign during the next few years.
Coordinating the Services

With the organization of the hospital, the home visits have undergone a change. On December 31, 1971, Golden Rain Foundation sold the Medical Center to Saddleback Community Hospital. The sale agreement obligated the hospital to provide a physician present in the Emergency Room at all times around the clock, and a registered nurse for office visits and home calls, to Leisure World residents, until the year 2002.

The arrangement was changed much earlier. In November 1975, the agreement was amended so that the hospital needed only to have a physician available on call when needed, and specified that his services should be coordinated with those of home nursing and the Home Health Agency. The nurse was continued. For this, Golden Rain was to pay $13,000 a year "... less any revenues received from operation of the program..." which meant the $12 per nurse visit paid by the patient.

Except for periodic increase in prices, this continued to be the arrangement until 1982. At that time the GRF Health and Welfare Committee set a sliding scale of charges for the services of the physician in the Emergency Room where consultation would be charged at $30 for a "brief visit," or $45 for "a limited visit." Diagnosis and treatment "considered to be a true emergency" was to be charged at standard Emergency Department rates. In addition it was necessary for the Emergency Room to record which patients were Leisure World people, in order to make reports to Golden Rain. This they found burdensome.

The following year, 1983, Golden Rain became concerned about the increasing costs. A survey showed that in the first six months of that year, there had been only 193 home visits by a nurse, while seven years earlier, in 1975 there had been 1,340, a 71% decrease in the face of continuing increase in population. Those 193 home visits had cost $41,895 or $211.89 per visit. The GRF Health and Welfare Committee proposed that the program for the nurse be eliminated.

Thus it developed that the hospital now stands independent. Residents use it as they would any other facility, and are treated like any other patient.
Social Worker

In December, 1970, Golden Rain Foundation and the Family Service Association of Orange County, a non-profit corporation, made a contract to operate a home health agency in the Medical Center to be licensed by the State of California. For this license, the home health agency required the services of a professional social worker, so it was arranged that the County Family Service Association employ one and assign her on a part-time basis to the home health agency. For a minimum of 35 hours a week, Golden Rain would pay the Association $1,200 a month.

Substantially the same contract was made again in 1972, but in 1976 it was Saddleback Hospital that made the contract with PCM, by which PCM should employ and pay the social worker who would be at the Medical Center for no more than 35 hours a week. This time, the payment was a minimum of 10% of the cost of the social worker plus any more of their time utilized by the hospital.

Over the years, such services became increasingly in demand. The service was early taken over by Maryon Welty, MSW and gradually she acquired a staff. She then headed a Human Relations Department with four qualified and licensed social workers. As she says, "there was a snake in the Garden of Eden, and even here we have problems."

The problems mostly have had to do with aging and death. As with any population of 22,000 there is a minor amount of alcoholism, of settling disputes between neighbors, of visiting grandchildren who want to play loud rock on a radio in the patio. At least Leisure World now has a rule forbidding skate boards. And there is the occasional paranoid. One lady casually mentioned in the laundry that God had told her to kill the man across her cul-de-sac because he was the personification of Satan. But the majority of cases involve the aging process or the death of a spouse.

Harry's wife used to do all of the cooking. When she died he did not even know how to turn on the stove. It took a lot of persuading to get him to go to the Senior Center for a good hot mid-day meal and some socializing.

Sophie came home from the hospital with a cylinder of oxygen and an attendant, but she soon fired the attendant. The Human Relations Department found her another, who was soon dismissed, as was the next one. One day, a neighbor living in the same building
docked in for a visit. Sophie had found an attendant through an
advertisement in The Pennysaver. In a room where oxygen was in
frequent use, this person was a chain smoker. The neighbor promptly
phoned the Human Relations Department which, with considerable
effort, tracked down the only available relative, a niece in Pittsburgh,
and persuaded her to come out and have Sophie moved to a more
appropriate setting.

Routinely, this group of graduate social workers help newly
bereaved widows and widowers cope with their grief. They help aging,
often lonely people solve the problems which arise in everyone’s
life, but more often in the lives of those for whom so many of their
contemporaries have already passed away.

Ambulance

In the very early days, any need for an ambulance was met by
service from Laguna Beach or other towns, but as the area became
more populated ambulance companies began to appear and to com­
pete for business. The Board of Supervisors of Orange County passed
an ordinance designating “emergency response areas” in the unin­
corporated parts of the county and requiring all ambulance companies
to have a license to give “911” emergency service in a certain area.
It likewise established the amounts to be charged for services.

In July 1978, the Golden Rain Board directed the Community
Relations Director T.J. Tandle to conduct an exhaustive evaluation
of the services which the other companies were providing. The Board
then reviewed all the companies’ performance, and the Orange County
Human Services Agency then asked the companies how many com­
plaints they had received regarding each of the six.

The Human Services Agency replied it had received one or two
complaints regarding four companies (including one for theft of a
patient’s property for which a man went to jail), but none at all
for two of the companies.

Negotiations were opened with those two, and eventually it was
decided to contract with one named “Doctors”. It proved necessary
to alter the districting somewhat in order that the one company
should be assigned territory that coincided with the acreage of Leisure
World, but with the aide of Supervisor Tom Riley, this was done.
It was also arranged that Doctor’s Ambulance could allow our people
a 15% discount, later increased to 25% when the county-stipulated rates were raised. This meant that whenever the paramedics at our Fire Station No. 22 were called to Leisure World and required an ambulance, it would be Doctor's that would be summoned.

In August 1978 all arrangements were made and the Golden Rain Board adopted a resolution authorizing a three year contract. In 1982, the GRF Health and Welfare Committee again conducted a careful survey of the situation and, with only minor changes, the contract was renewed for five years; again in 1987, after thorough review, including some price changes, a contract was made for another five years.

The contract provided that the company shall have two 24 hour vehicles always available; fees shall be charged to the patient with 25% discount; the company shall fill out the Medicare and supplemental insurance forms and submit them to the patient with the invoice and shall make a quarterly report to Golden Rain of services performed.

There is no agency or employee relationship between the company and the Golden Rain; the company shall hold harmless Golden Rain in the event of any liability; the company shall have insurance for liability, for automobile, for professional liability, for worker’s compensation and any other that may be required by any government.

The rates as of March 31, 1989 were:

<table>
<thead>
<tr>
<th>Service</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Rate</td>
<td>$110.00</td>
</tr>
<tr>
<td>Mileage</td>
<td>$7.50</td>
</tr>
<tr>
<td>Emergency Call</td>
<td>$22.00</td>
</tr>
<tr>
<td>Night Call</td>
<td>$22.00</td>
</tr>
<tr>
<td>Oxygen Administration</td>
<td>$22.00</td>
</tr>
<tr>
<td>Standby per 15 minutes</td>
<td>$22.00</td>
</tr>
</tbody>
</table>

Other ambulances are allowed to compete for business and are not denied entrance into Leisure World when called by a resident. But in the Health Services Guide (see section below) it is explained that, while residents may call any ambulance of their choice, only one, Doctor's, provides the 25% discount from the regulated fees established by the county.

In November, 1988 the County Supervisors made a change and
awarded the paramedics emergency contract to another firm "Medix", effective January 1, 1989. Thus, if a patient should dial 911 and ask that the paramedics at the fire station send an ambulance, it will henceforth be Medix that comes. If a patient wants a Doctor's Ambulance with its 25% discount, he must call them direct. Medix subsequently granted the same discount for its services.

Guinea Pigs

As the years passed, while Leisure World grew, the science of gerontology began to receive more attention and to be the subject of research. Our cordial relations with the Andrus Gerontology Center at the University of Southern California, later the Andrus School of Gerontology, which had provided important guidance in the early days continued active, as other schools, e.g., the University of California at Irvine, instituted similar programs including occasional research projects.

For any research among the elderly, Leisure World provides a very attractive gathering of subjects. It early became evident to our boards that there was a need for some rules. The Health and Welfare Committee of the Golden Rain Board, which included one or more physicians, and still does, was assigned the task of setting up some guidelines. This was done under the chairmanship of Gilbert Nelson. The same committee continues the responsibility of scrutinizing each application.

The requirements varied slightly now and then, but were substantially as they are today, to wit: Initial applications, besides identifying the researcher and his parent organization, which must be of unquestionable repute, must describe the purpose and length of time of the investigation, the evaluation methods, the funding, the population to be selected and the method of obtaining participants — including arrangements for transportation, if necessary. Confidentiality of participants must be assured, as well as potential benefits to residents of Leisure World.

If the Committee thinks well of the proposal, the researcher (often a team) is invited in for a personal conference and given further guidelines.

Physical examinations, laboratory specimen collecting or other medical procedures must be performed in a proper medical environment. Investigations of any drugs for experimental purposes are not
acceptable. Residents may cease participation in any investigation without explanation or responsibility. There is not to be any charge or expense to a participant. Multiple investigations of a similar nature are not permitted unless they are collaborative, leading to a joint conclusion. Five copies of the final results must be presented to the Golden Rain Foundation.

Once accepted, a research project continues to be monitored now and then by one or more members of the Health and Welfare Committee. The researchers turn to them for advice, occasionally expanding the scope of a project. In general, such researchers find an ample number of willing subjects, even in a project which requires contacts periodically over as much as five years. The research results provide a continuing addition to doctors' ability to solve the problems of aging.

Health Services Guide

In 1979, two retired physicians, Dr. Ward Darley and Dr. Stanley J. Leland, each with a public health background, who were members of Saddleback Kiwanis, undertook to compile a directory of health and medical resources available to Leisure World residents.

The resulting 16 page booklet was printed by California Federal Savings & Loan Co., and distributed to all Leisure World residents by Kiwanis as a community service. Two years later, a new edition was brought out on the same basis.

Subsequently, beginning in 1985, a similar Health Services Guide has been produced by the Health and Welfare Committee of Golden Rain Foundation. The first one was distributed to all residents. Since then, it has been periodically updated and is included in the “Welcome Kit” for all new move-ins and is available to any others who may want it, without charge, from the Human Services Department.

This Guide lists a variety of facilities including exercise programs, the continuing education program, lawyer referral, an adult day care center, as well as emergency services, with telephone numbers and the scope of each service.

Walls and Gates

With people in the cities becoming increasingly concerned about
burglars and rapists, a major attraction of any future dwelling, especially a retirement community, was safety and security. Thus, as they had at the Seal Beach project, Rossmoor Corporation included a wall with guarded gates as part of the original plans. It proved to be a wise decision; as living in many places throughout the nation became ever more perilous, especially for the elderly. Security continued to be one of the primary topics in the minds of people looking for a retirement home, and they found it in Leisure World.

The walls were erected of concrete block of a pink sand color. Each gate had a curved wall with “Leisure World” and the gate number, leading to a small house in which was a guard, either looking out a window or standing outside.

In the early days, when the community was far removed from any significant number of residences, that was enough. However, in the ’70s Leisure World found itself surrounded by other housing developments, including families with teen-age boys looking for adventure. We began to experience occasional episodes of vandalism, the operation of a golf cart during the night-time hours, even burglary. Hence a two-strand barbed wire fence was added on top of the wall.

Staffing the gates was the province of the Security Department which also provided patrols. Keepers of the gates were all men until the late sixties when women were added to the roster. Now more than one third of all the guards are women. One of the first was Margaret Cates, then a recent widow. After six months, mostly on Gate 5, she was married and quit her job.

One gate was different from all the others; it had no guard, but could be opened by a key, a copy of which was issued to certain people. This gate was in the part of the wall at the rear of several of the churches and the Jewish Temple. Members living close by were given a key to the gate. Later the space at the southeast corner of El Toro Road and Moulton Parkway, previously vacant, was made into a fairly large shopping center. People living in the vicinity asked for a key to that gate so they could have a short-cut to the shopping center. So many people requested keys, that eventually it was decided there was a threat of breach of security and the gate was permanently closed and all keys withdrawn.

In all decisions regarding gates, there were philosophical questions to be decided; consideration of personal freedom versus safety and the welfare of the whole community, demanded and received careful
consideration by the governing bodies.

The Patrols

The Security Division grew with the community. In June, 1986 it was restructured under a new Director, Daniel V. Woodward, with five sections; Records, Operations, Hazardous Materials/Fire, Safety and Administration Training. Operations included the security personnel who patrol the community. There are 21 special deputies, all of them former members of governmental law-enforcement agencies, usually from a nearby town with which they keep in friendly contact. They are licensed to carry a side arm and do. They are augmented by 267 of our own residents who, together, ride 350,000 miles a year, up every avenue, into each cul-de-sac, three times every 24 hours. The residents work a 20 hour week and are paid a wage that will not interfere with their Social Security.

For the year 1987, the Security Division noted that there had been 110 misdemeanors (trespass, vandalism, etc.), one tenth the number of crimes which had occurred in San Juan Capistrano, although Leisure World has a 25% greater population.

The Security Division is responsible for traffic. Throughout Leisure World the speed limit is 25 mph. Anyone caught exceeding that speed, or failing to stop at a marked intersection will receive a citation. With a third citation, there will be a summons to meet with a safety officer for a stern lecture.

The Security Division controls identification cards and guest passes. Here again, the growing population, which increasingly surrounds the community, necessitates ever more stringent rules. Each car has a sticker, formerly on the bumper, now on the lower left corner of the windshield, on which a new numeral must be added each new year. In addition, each resident has an individual card, to be shown to the gate guard if entering on foot or to the driver when riding the bus. This personal ID card was changed in June, 1988, each resident being sent a new one of a different color. The reason was that some cards, belonging to people who had died or moved away, had found their ways into the hands of others.

For guests, a resident may obtain a guest pass for up to three months. Since 1986 it is valid only at the gate in which the resident lives. For the occasional guest, the resident phones his gate giving his own I.D. card number, his address and the name of the expected
For commercial services, the one-time upholsterer or the weekly cleaning girl, the resident can obtain an appropriate pass by application to the Security Division in the Administration Building. Any of these are good for no more than six months.

Some people like to rent their manor if they are to be away for several months. There is a leasing office which issues a special pass for such tenants.

Buses

Among the features of Leisure World from its early planning, has been free transportation within the complex and to certain adjacent facilities within the original planned community. The bus would be driven by someone who lived in Leisure World. Thus it was that on September 30, 1964, a few days after he and his wife moved in, a certain Bill Mannix was hired as the first driver of the one and only bus.

Negotiations with Orange County had produced a limited license permitting a privately-owned bus line, operated by people with only an ordinary driver’s license to operate a car, to transport — not for pay — the residents of Leisure World throughout the property that Rossmoor had bought.

The Sales Department of Rossmoor had a “Discovery Bus” to provide a tour of the property for prospective purchasers. It was driven by one of several well-instructed Leisure World residents, each of whom worked a short day, as the volume of customers might require.

The first bus for residents was powered by compressed propane, with a sign on the back proclaiming its “Clean Air” capacity. It traversed the half-dozen streets bringing people to the one and only clubhouse, now Clubhouse One, thence to an “Alpha Beta” market which was outside the gate but on land owned by Rossmoor.

Then as now the bus driver was a friend to his passengers. A Methodist minister confided to Bill Mannix that he was trying to form a congregation in Leisure World by holding services in the Clubhouse, but was afraid nobody would come. Bill told all his passengers about it for the next three days and the first service numbered 33 persons, including the Mannix’s.

Another early driver was Willard O. Miller. In an interview in May 1988, recorded by Cushman Clark, Clark asked “I wonder if
you’d comment on the bus trips that were organized by the Education and Recreation Department. The March 17, 1965 issue of the Leisure World News mentions bus trips to downtown Los Angeles, Farmer’s Market, and so on. Did you go on any of those trips?” Miller replied “Yes, I was asked to be responsible for the 41 passengers. We would go down to see ‘Modern Millie,’ ‘Hello Dolly’, ‘Sound of Music,’ the ballgames, Hollywood Racetrack and things of that nature.” These trips were usually by chartered bus.

The first bus, painted sky blue, as have been all subsequent ones, was an excellent vehicle but there came a day when it no longer suited our purpose. Over the years, improving the design of the buses has been the concern of the Transportation Committee of Golden Rain Foundation. The Committee had to consider costs, but they gave a top priority to the special needs of people in a retirement community. The steps at the entrance must have risers not too high, and treads wide enough for the entire foot. The driver must be able to see that his exiting passenger is all the way down from the last step; for this there is an elaborate arrangement of mirrors. The vehicle must be sturdy with plenty of handholds, and with a motor strong enough to make it up hills, some of which are quite steep.

The Bus committee carefully studied the nature of the errands of the passengers; many were either doing grocery shopping or some form of handicraft. They boarded the bus carrying a bag or bundle. For this reason the choice was made for “perimeter seating.” That is a continuous bench all around the perimeter of the vehicle so no one would have to get out of the way of another’s entrance or exit as is necessary in the standard arrangement of a row of seats for two on each side of a center aisle. This perimeter seat must be high enough so that people can stand up without too much trouble. The new buses have space under the seat for a really good-sized bundle. There is a stanchion for every two people.

With the continuing increase in population, more buses and drivers were added and routes and schedules were repeatedly rearranged. As new homes were being built by the dozens, even by the hundreds, both in Leisure World and in near-by areas, attractive shops and restaurants began to open outside our walls. Soon residents began to ask for Leisure World bus service to their homes, and even beyond the walls. Some of the latter were on land included in the original Rossmoor purchase and thus included in our contract; our buses could and did go to them. Others, at no greater
Among the groups that formed in the early days, as much for their own enjoyment as to entertain others, was the Leisure World String Ensemble (above) which developed into the Leisure World Orchestra. Another group dating from early days is the Leisure World Chorale (below) an organization of more than 100 vocalists whose annual performance is a cherished event.
distance, but in a different direction were not within that original purchase so bus service to them could not be allowed. It was necessary to explain repeatedly the nature of our limited license with the County.

The propane motor having proved unsatisfactory, we went to diesel with the engine in the rear. Research revealed that the exhaust from a diesel, though more visible, is less toxic than the exhaust from a gasoline motor.

In the late 1970s when Blue Bird buses were being ordered with diesel motors, there was a major protest among some Leisure World people concerned about pollution, who wanted gasoline motors. The manufacturer, with considerable difficulty, made the change to gasoline, an expensive mistake. We are now back to diesel which, experience has shown, is vastly more satisfactory for this particular job and substantially less expensive to maintain.

When it was time for another lot of buses to be ordered, the Transportation Committee undertook a canvass of bus riders to determine their preferences. Based on the results of this survey, in 1985, detailed specifications were drawn up and sent to more than a score of manufacturers in the United States and abroad, with a request for proposals. Only three replied. One of them was a company in Florida which cited several impressive references for its ambulances. One bus was ordered from them.

The time came for delivery but no bus. Eventually it was learned that the project manager whose responsibility it was to build our made-to-order bus, had moved to another company leaving our bus standing half-finished. When, at last, it did arrive, it proved to be a poor job. Some 50 faults were found and it was returned with notice that the maker had one month to correct the faults. Two months went by with no word from the maker, so we were obliged to start over.

Eventually, we settled on the National Coach Co., in Chino, California, from which we have purchased four new coaches. This new purchase is priced at nearly $110,000 a copy, as against $30,000 for our earliest vehicles. The new ones have diesel engines in the rear, a short wheelbase so it can turn around in a cul-de-sac, seats 23 on its perimeter seating, and is "as quiet as they come."

The Leisure World bus service operates 12 routes. Every hour on the hour, they converge in front of Clubhouse 1, and in an hour or less will take you to any point in Leisure World and to such of
the commercial establishments as are within the original Rossmoor planned community. In 1986 an additional transfer point was established across El Toro Road which bisects two major parts of the community, to expedite travel to certain areas. Each bus travels about 100 miles a day, making a stop an average of 2-1/2 times each mile.

There are 65 drivers of whom 40 live in Leisure World. The most senior driver is Ron Castetter, a resident who has been driving since 1971; the youngest lives outside Leisure World, a girl college student aged 22. Each shift is just less than six hours. There is a special "B" bus which operates for evening entertainments by reservation; currently it will pick up passengers after a performance at Clubhouse 3 and take each person home to his door. Otherwise, all buses run from 8:00 a.m. to 6:00 p.m.

The service continues without any charge to the rider, but, since 1986, each passenger is required to show a Leisure World I.D. card to prevent the entrance into our premises of "unauthorized persons."

Frequent passengers get to know each other and look forward to a chat with a neighbor on the way home from a swim or a craft show when they often exchange recommendations for a grocery, a hair-dresser or a physician. The bus drivers continue to be friends with their passengers. Frequent riders find out when the driver's birthday is and sing him a "Happy Birthday" with a gift of cookies. They show him their handicraft or the new picture of their grandbaby. One driver had a wife who liked Hawaii and wanted to move there, but the driver said "Oh no! I wouldn't want to leave the bus!"
Beyond The Walls

Communication with the outside world or participation in its affairs was of little concern to the early residents as they found their way along the winding pathways and streets to the manors of newly acquired friends in Leisure World. They had found their haven of rest in an oasis and could well afford to let the rest of the world go by without regret. Nearby inhabitants of the outside world were not exactly neighborly confidants — the grazing horses and sheep on the Moulton Ranch, deer, rabbits, coyotes, and an occasional cougar wandering out of the distant mountains.

If there was danger of becoming insulated against the world, it was not to last. Basic household needs had to be met. But there were no shopping facilities. Two miles to the east on the main thoroughfare — El Toro Road — at its junction with the Los Angeles-San Diego line of the A. T. & S. F. railway, was the sleepy little El Toro Market. Almost overnight its business began booming as Leisure Worlders discovered it. And a need for transport was born.

NEED FOR TRANSPORTATION

The original “candy-stripe” Leisure World bus on its single route within the walls could not be used. So an “accommodation bus” made the run to the market daily until the planned Laguna Hills business center could get underway. Likewise, residents discovered a more expansive market in Tustin, six miles distant, and arrangements soon were made for a twice-weekly trip to the Larwin Square market for a $2 roundtrip fee.

By April, 1965, negotiations had been started by Laguna Beach merchants to provide transport for Leisure World shoppers as an enticement to stroll in the beach city. In July a year later the “shoppers special” started twice-a-day service. The $1 roundtrip ticket
was free when validated by a participating merchant.

The need for public transport to serve Leisure World’s growing population was recognized in 1965 when, on July 1, the Southern California Transit District began service three times daily to Santa Ana, with continuing service to and from Los Angeles. Leisure World had arrived!

Construction of the business center was proceeding and the Leisure World buses, on their regular schedules within the community, would be able to serve the medical center and the business center — all within the area of the officially designated “planned community” of which Leisure World was the magnet in what became known as County Service Area No. 4.

SHOPPING MALLS DEVELOPMENT

By the spring of 1965, the population of Leisure World had mushroomed to nearly 1,500, yet they were dependent upon the distant markets for groceries and the most meager daily needs. An elaborate Laguna Hills Mall was on the drawing boards of the Rossmoor Corporation to become the “anchor” of the planned community business area. The need was now immediate. In March a small Alpha Beta Center, with a market of that name and 10 convenience shops opened. It was the first shopping facility in the entire Saddleback Valley — Leisure World’s own, since for miles around were only scattered farmhouses.

One necessity had not been met. Retirees expected to avoid household chores. There was no restaurant. With the opening of Clubhouse 2 in September, the rules — (no business permitted within the confines of Leisure World) — were bent slightly, and the well-known Mannings was permitted to serve a “light” dinner menu in the clubhouse. A month later the Mannings Restaurant was formally opened with much fanfare opposite the newly developing business center on El Toro Road. Residents could conveniently dine out at the location to be known in later years as Delaney’s. The continuing popularity of “dining out” soon attracted a stream of convenient eateries throughout the Valley.

Sales of manors were booming in 1965 with more than 2,000 families moving in; in 1966 sales slowed somewhat to 1,600 new families, and in 1968 the market dropped to a whisper; only 452 new manors were sold, with the result that development of the
projected business section was eased. As 1969 opened, the change from cooperative ownership to development of condominiums brought a new surge in activity; sales increased to 888, and as the upswing continued through 1970, with 914 manors, including the newly designed Garden Villa apartments, having been sold, attention to developing the business center rebounded.

Laguna Hills Mall is Started

Actual construction of the Laguna Hills Mall began in April, 1971, as a joint venture between the Rossmoor Corporation and the Ernest W. Hahn organization, a nationally known shopping center developer. Planned to be built in two phases, the first phase included a major Sears store at one end and a Buffums’s department store at the other, with some 45 specialty shops intervening. This phase was completed and formally opened on October 4, 1973, although Sears had opened as early as the previous March, and many shops had opened at varying dates to the delight of awaiting customers in Leisure World.

Construction of the second phase began immediately thereafter, planned around two additional department stores — The Broadway and J C Penney — with an additional 30 specialty shops, and both phases enclosed within an elongated, air conditioned mall that provided Leisure Worlders a comfortable strolling and lounging area within which to shop, dine and amuse themselves. This was a true “regional” shopping mall, completed at the end of 1975, catering to a rising population in southern Orange County that by now was approaching 300,000 — a growth phenomenon that had started 11 years earlier with the opening of Leisure World.

In the meantime, as the regional mall was being planned, it became obvious that the expanding community had an immediate need for more convenience shops within easy walking distance. The answer was the small Valencia Shopping Center, begun in September, 1971, and opened in August 1972. Adjoining the Administration Building and Clubhouse 1, but outside the walled area, it featured a Ralph’s Super Market and Pharmacy, a nearby Security Pacific bank, and 18 convenience shops, with parking areas at the corner of El Toro Road and Paseo de Valencia. It became the resident’s popular “drop-in” marketing facility.

With continuing expansion of construction in 1971-72 into the
area of newly-established gates 7 and 8, attention turned to the future need of a commercial center to serve residents in this northwestern area of the community. Plans appeared in 1972 for clearing a 32-acre site at Moulton Parkway and the newly designated Santa Maria Avenue. This would be an enclosed mall with a major market, bank, restaurant, theater, pharmacy and small shops. But plans changed before construction got underway. A major portion of the Rossmoor property immediately to the west of the site had been sold for development, independently, to younger families, with an elementary school projected. The business mall project would be re-thought.

Moulton Plaza Finally Appears

By mid-1970, Leisure World had grown to 11,500 manors, with nearly 20,000 residents, with gates 9, 10, and 11 building up. Time was ripe for the new center. The earlier idea of an enclosed mall was abandoned. The new Moulton Plaza Shopping Center would be anchored on a major super-market, a bowling alley, two financial institutions, two or more restaurants, a pharmacy, and 12 shops. Since the location qualified for inclusion in the Leisure World bus route, it became one of the most active of the shopping centers, aided in later years by the addition of a state auto licensing substation.

As 1979 dawned, it was apparent that the “Wall Street of Laguna Hills” had been created along El Toro Road, extending from the Laguna Hills Mall area westward to Moulton Parkway. At the corner a 13-acre site was ready for development by Rossmoor as the Willow Tree Shopping Center. Its anchor was a Safeway Supermarket — now Vons — with on-site food service facilities. Opening first, in December, was Gibraltar Savings, followed in 1980-81 by two banks, a restaurant and 20 convenience shops. The commercial centers planned specifically to serve Leisure World were now complete.

In the meantime, however, responding to the burgeoning growth in Leisure World, the entire Saddleback Valley was blossoming with homes and shopping areas designed to serve the varying demands of families of every age. To the east, along El Toro Road were the Laguna Hills Plaza (later Saddleback Plaza) at Rockfield Road, Twin Peaks Plaza, Orange Tree Plaza, Plaza Jardin, and others. Further away, to the north, business centers appeared on Lake Forest Drive, and to the South at La Paz and the Freeway, where the first hotel,
opened as a Hilton in 1969, later becoming a Holiday Inn in 1977, a focal point for entertaining in the area.

Other Developments Add Interest

Probably the most salient early architectural achievement in the Valley was the building planned as the “World Headquarters” of the Leisure World Foundation, popularly termed the “Taj Mahal.” Sited prominently in the broad expanse immediately outside the confines of Leisure World, it was a three-story, columned structure reminiscent of the Orient. Completed in 1965, it housed the Cortese organizations until sold in September, 1968, to a securities firm, Dulaney & Associates, at a time when an economic slowdown forced liquidation of some of the Rossmoor holdings and curtailed dreams of world-wide extension of Leisure Worlds. It remains today a striking landmark on the Laguna Hills landscape.

Most significant in identifying Leisure World has been its “Unisphere,” trademark of Rossmoor developments. It was the brainchild of Ross Cortese after a visit to the World’s Fair in New York. A 32-foot steel-frame globe, with the land masses depicted in fiberglass, it rotated on a water-fountain base, bathed in colored lights. As the community built out it needed a permanent home. It was offered to the Leisure World Historical Society, but neither the Society not the GRF felt able to maintain it. The Society’s early president, M. H. Waterman, in discussion with County Supervisor Thomas E. Riley, found interest in its becoming a county historical landmark. It stands today on its nearly one-acre site above the Freeway, contributed by Rossmoor as a county mini-park. It no longer is rotating, but it remains a permanent symbol of Leisure World.

All Leisure Worlders are aware and appreciative of the county’s Fire Station No. 22, located near the site of the Unisphere. Its opening was celebrated on October 21, 1966. Its one fire engine served well. Not until August, 1973, was another engine required and a paramedic team added. It now rates as the most efficient — and the most active — of the county’s stations.

Across the street is the area’s first motel, developed by Leisure World residents for the convenience of their guests in the early years. Realizing the need, as the community attracted visitors from other states, a resident leader, Harry A. Brunson, organized a group of 68 fellow residents to build a facility to serve over-night visitors. The
result was a 72-room Laguna Hills Motel. It opened with much fanfare on November 16, 1968, at a cost of $750,000. An additional 50 rooms and conference facilities were added later and in 1971 it became a Hyatt Lodge. Leisure World now could be proud of its own extensive business center.

RELGIOUS SERVICES

When the opening-day residents of that 10th of September, 1964, settled into their manors, they may well have wondered how far distant they would be traveling to find a place of worship. None was in evidence. But the question had not been overlooked by the planners of Leisure World. Developer Ross Cortese let it be known that as soon as any congregation of 100 or more parishioners was organized, it would have the opportunity to choose a site from among several that had been set aside immediately outside the walls, and would be given a deed to the land without cost if construction was started within a period of two years.

In the meantime, the newly arrived residents had three choices of a place of worship: the historic St. George’s Episcopal Mission Chapel, dating from 1891, stood three miles to the east, near the El Toro Market; across the street was St. Anthony’s Chapel in a building erected in 1889 as the El Toro school, purchased in 1961 by the Catholic Church as an adjunct to the Mission at San Juan Capistrano. More conveniently, on that first Sunday, September 13, 1964, the Reverend H. Carl Roessler, director of religious services of the Leisure World Foundation, had arrived from Seal Beach to conduct an ecumenical service in Clubhouse 1. An atmosphere of religious worship had begun.

As new residents arrived, their religious preferences were made known as an aid to the formation of congregations. The first to hold a service, by arrangement with the Southern California Council of Churches, was the Methodists, meeting in the Art Gallery of Clubhouse 1, with the Reverend Joseph D. Butler, appointed as pastor. It was October 11, 1964, at 11 o’clock, one month after the first residents had moved in.

Some Congregations Soon Form

Congregations formed quickly. The Lutherans held their first
service on November 22, 1964, in Clubhouse 1 with Mr. Roessler, who had initiated the first service in Leisure World, conducting services until December 1, 1965, when the present Lutheran Church of the Cross was formalized, with the Reverend Vernon Cotter assigned by the Synod of the Lutheran Church of America.

On May 16, 1965, the Presbyterians held their first service, also in Clubhouse 1, with the Reverend Edward James Caldwell, D.D., invited by the Presbytery of Los Angeles as the organizing pastor. He was joined within a year by Leisure World residents Reverend Kenneth S. McLennan, and Reverend John E. Simpson, as Associate Pastors. The congregation grew rapidly to more than 300 and moved to Clubhouse 2 upon its opening.

Members of the Jewish faith began meeting informally in early 1965 and on June 11 held their first service in Clubhouse 1. They already had decided that they would accept the offer of a building site, had made a token down payment of $10 and proceeded to hold regular services in the clubhouses. They also had made a historic decision: the members elected not to affiliate with any of the individual branches of Judaism but to employ ritual and substance from each, and not to have a rabbi, but to have congregants lead services and deliver prayers.

The Christian Scientists met for the first time on June 15, 1965, the first readers being Thomas Heslup and Marion Butler. In January, 1966, the congregation was formally recognized as a Christian Science Society by the Mother Church in Boston, with Alvah T. Smith and June Young the first elected readers.

On November 7, 1965, the first Baptist service was held, meeting in Clubhouse 1, with Missionaries Dr. and Mrs. Vernor Olson called by the Southern California Baptist Church. On December 5, First Communion was celebrated, and on December 14 the congregation was officially organized.

Members of the Christian Church (Disciples of Christ) met for the first time on January 2, 1966, called by the Reverend John Wesley Runyan, minister of the Poway Valley Christian Church. The group met in Clubhouse 1 and on April 1 became the First Christian Church of Laguna Hills. It continued to meet in the clubhouses, subsequently changing to Clubhouse 3, and was one of the three organized churches that did not, eventually, build its own edifice.

Members of the Congregational Church were meeting in mid-1967 in the manor of Mr. and Mrs. Lloyd Hall. As the group progressed
it organized as the Mayflower Congregational Church of Laguna Hills, its first formal service being held on January 7, 1968, with the Reverend Fred Niedringhaus, retiring pastor of the Santa Ana Congregational Church, as pastor. It continued to meet in Clubhouse 1, choosing that site as being most convenient to members, being at the terminus of the Leisure World bus routes. When the time came to choose a building site, the members decided to remain in the original clubhouse location.

Congregants of the Unity Church first met on April 24, 1968, in Clubhouse 1, at a midweek assembly conducted by the Reverend Hertha Tuntland. Sunday morning services began shortly, conducted by Mrs. Eleanor Marshall and Mrs. Leigh Lukawiecki, Leisure World residents, until the growing congregation moved to Clubhouse 3, where it remained.

Era of Church Building

The Catholic congregation had outstripped the tiny St. Anthony's Chapel and had moved to holding Sunday mass in Clubhouse 2 upon its completion in September, 1965. Shortly thereafter, in December, ground-breaking ceremonies for the new St. Nicholas Catholic Church were held on its plot immediately to the west of Leisure World's Gate 1. The first mass was celebrated on August 28, 1966, and formal dedication by His Eminence Cardinal James McIntyre of the Los Angeles Archdiocese took place on July 9, 1967. The first of the several churches to serve Leisure World was in its own structure.

The Methodists, having formed the United Methodist Church of Laguna Hills, were not far behind in selecting their site on Moulton Parkway. Ground-breaking was celebrated on February 27, 1966 and the first service was held in Fellowship Hall on November 6, with the Reverend Alec Nichols as pastor. Formal dedication followed on November 11, the first of a series of such dedicatory ceremonies in recognition of the family of Leisure World oriented religious structures.

The congregation of the Lutheran Church of the Cross had selected its site on the north side of El Toro Road opposite the newly built Catholic Church and ground-breaking ceremonies were held on September 11, 1966. The first service was held on July 16, 1967 and the sanctuary was dedicated on November 12, by Dr. Carl
Segerhammer, president of the American Lutheran Synod, with Reverend Vernon Cotter remaining as Pastor.

The growing Jewish congregation had selected its building site immediately to the south of the Methodist site on Moulton Parkway. The cornerstone of the new Temple Judea was laid on August 20, 1967, followed by formal dedication of the Temple on March 31, 1968, by Rabbi Aaron Toffield and Cantor Philip Moddell of Temple Beth Emet in Anaheim. Clergy from all of the Leisure World churches participated with congratulatory messages. A sharing of the open space between the Temple and the Methodist Church permitted an enlarged parking area for both, and arrangements were made with the Golden Rain Foundation to permit a gate to open from Leisure World. It became known as the "Friendship Gate," the gift of a Temple member, Paul F. Wynhauser, and was dedicated on June 22, 1969. Although locked, members of the two congregations had keys for direct access from Leisure World until 1986, when it was closed permanently for security reasons.

Prominent Leaders Are Called

The new Presbyterian congregation had selected a site distant from the first gates of Leisure World, atop a hill and adjacent to the newly designated Gate 7, west on El Toro Road. Ground-breaking ceremony was held May 21, 1967 with the first service in the newly completed Sanctuary on August 25, 1968, and the formal dedication of Geneva Presbyterian Church taking place that evening with Dr. Caldwell presiding and the Reverend Louis H. Evans, pastor of the Hollywood Presbyterian Church giving the dedicatory sermon. The congregation by that time had grown to more than 900.

The Christian Scientists began ground-breaking on July 22, 1968, on the selected site on the west side of Moulton Parkway. Building began and on February 13, 1969, they were qualified by the Mother Church to become the First Church of Christ, Scientist, Laguna Hills. On July 7 the first meeting in the new edifice was held, with Thomas Stinson and June Young serving as readers. Formal dedication could not be held until 1975 when the property was fully paid for, a requirement of the Mother Church.

The Baptists took possession of their site, immediately to the south of the Christian Science site, with ground-breaking on September 22, 1968. The Sanctuary and Fellowship Hall of the First Baptist
Church of Laguna Hills was dedicated at its first service on October 12, 1969, with its original pastor, Vernor Olson, officiating.

In the meantime, St. George's Episcopal Church, having far outgrown its small Chapel to the east, had been offered a site west of Moulton Parkway. Forseeing a need throughout the Saddleback Valley, it chose instead to purchase from the Rossmoor Corporation a similar size site, offered at a favorable price, on Avenida de la Carlota, and overlooking the recently completed San Diego Freeway. A formal Processional initiated the ground-breaking ceremonies on August 4, 1968. The first service was held on July 27, 1969, with Frederick C. Hammond, previously the Vicar of the Chapel, serving as the Rector.

The church building program was complete. Eight houses of worship had been initiated by Leisure World congregations. Three others, the members of the Christian, Congregational, and Unity churches, respectively, had chosen to continue to hold their services in clubhouses. As time went on, other groups would form in the neighborhoods of Laguna Hills and the Saddleback Valley, inviting participation by Leisure World residents, but the pattern of religious worship in and about Leisure World had been established.

The Religious Council

During the period of development, beginning in 1965, the various ministries had found cramped rented quarters in the clubhouses and shared space as the new church buildings appeared. A spirit of camaraderie and fellowship developed among clergy and congregants. There was need to help orient newcomers in the selection of their church homes.

Reflecting the spirit of cooperation, the Religious Council was formed. Evening meetings for all congregations to participate were held at the various buildings as they were completed. Residents could feel welcome in any house of worship.

The Religious Council continues into the 25th year of celebration, the clergy meeting informally from time to time, and clergy and communicants holding ecumenical services at least annually in which all join in a spirit of mutual goodwill. Its value was exemplified in the early 1970's when the Council coordinated the effort of the various congregations in helping to resettle families of the “boat
people” of southeast Asians fleeing into Southern California. By then the churches that Leisure Worlders had initiated were receiving families of the young married people into their congregations. Thus began a new era of building — addition of school rooms, nursery facilities, wedding chapels, lecture halls — all rounding out the family worship aura that had begun with grandfatherly efforts to fulfill a need in their new retirement home. The houses of worship had become centers of family life in an enlarged community in which Leisure World remained a dominant influence.

TELEVISION PLANNING

As the hills of the Moulton Ranch were being carved up in 1963, preparatory to laying out the streets and constructing the first manors, the question came to developer Cortese: “How to assure television reception from TV studios 50 or more miles away to the thousands of homes to be built?” A multitude of individual antennas was unthinkable. The answer must be an underground cable system.

There was little experience on which to build. A thousand small, localized cable systems existed; none recorded engineering experience to indicate solutions to problems to be overcome in laying and servicing the hundreds of miles of cable required. A Southern California electronics firm agreed to try under a contract with the Rossmoor Corporation. Within a year it had failed financially. A research and development contract was entered into with Rossmoor Electric, Inc. (no relationship) to explore the problems. Before the necessary technological research had been completed, the developer entered into an agreement with another contractor to build and maintain the contemplated system.

By 1965 manors were being occupied, but there was no TV. The contractor could not overcome the problems. Again, Rossmoor Electric was called upon to engineer and develop the partially completed system. This time the research that had been done paid off, and in early 1966 the system was on line. Thereafter, periodic contracts were negotiated with Rossmoor Electric to maintain the cable system, but ownership and operation of the studio was the responsibility of Leisure World Foundation, the predecessor of PCM, as managing agent, under the direction of its Education and Recreation Department.

Equipment was inadequate, the initial one-half-hour-per-day
schedule of telecasting would be interrupted by malfunctions, and the staff became frustrated in its efforts to give even a minimum of service. Nevertheless, the service had proven to be valuable as an internal means of communication, although not yet a reliable conveyor of entertainment to the residents. Its potential was recognized and by the end of 1966 when the Golden Rain Foundation purchased it as a community facility for the sum of $54,245.00, a seemingly costly gamble at the time, but it was a bargain-basement acquisition in the end. Rossmoor Electric continued only as maintenance contractor of the cable system.

By 1968 the efforts of a dedicated but inexperienced staff, supplemented by enthusiastic volunteers, was struggling to extend programming on the local Channel 6 in an effort to prove to residents that “their” TV was a worthy supplement to the eight commercial and public channels made available through the cable system. It was touch and go! Finally, the employees could not be paid. So they formed their own company, Internet Productions, Inc., and contracted with GRF in late 1968 to take over production responsibilities. By mid-1969 they were in trouble and could not continue. Some of them formed a new group, “Cablecasters,” and renegotiated the production contract. With an influx of new capital, remote control facilities and additional equipment were introduced, but money soon was exhausted. Technical expertise was lacking and breakdown of equipment kept them off schedule and, on some days, off the air.

Rossmoor Electric again was called upon, this time to determine if it could add to its operation and maintenance of the cable system the responsibility for rehabilitation and operation of the studio and programming. A one year contract was signed. On January 1, 1970, a new era in Leisure World TV service had begun.

Meeting New Challenges

Studio facilities were redesigned and rebuilt, new equipment was added both by Golden Rain Foundation and by Rossmoor Electric. In February Rossmoor took a major step forward by adding the Weatherscan System, enabling 24 hours a day weather reporting whenever the channel was in operation. New residents could tune-in immediately. A popular Bingo Game was added. In April a survey into residents’ backgrounds and desires provided input for future planning. Telecasting was in black and white. But new residents were
displaying their color sets. The time for major change and capital investment was upon us!

"1971 — The Growth Year" became the motto. A new contract giving Rossmoor Electric full responsibility for personnel, management and operation of Channel 6, as well as maintenance and operation of the cable system, was entered into by GRF on the basis of payment of a single monthly fee covering all costs assumed by Rossmoor, with provision of its right to secure and retain advertising for the channel, the net cost to residents to be about 84 cents per manor monthly. Access by residents to the eight channels then available was included. New equipment permitted broadcasting in color to begin in February, 1971.

The years of pioneering struggle were ending. Perplexing problems were being solved by placing full responsibility upon professionals. A devoted staff remained in place, having served a difficult apprenticeship while the facilities and the community expanded. Three names are especially significant. Rob Merritt, a telecommunications student at California State University, Fullerton, had been a volunteer "intern" beginning in January, 1969, and an off-and-on part-time employee since, as had been George Phelps, who had joined in August of that year, and Carolyn Wood, who came aboard in 1970. On the 25th anniversary of Leisure World all three remained, as news director, programming director, and coordinator, respectively, responsible for the day-to-day operation of a now successful enterprise.

A Training Facility

In the meantime, the Channel 6 studio had become a favorite training facility for both students and faculty in telecommunications studies at educational institutions in Orange County. Many student interns had gone on to jobs in the networks. The studio, however, could not have been operated without the continuing help of many devoted resident volunteers who served in 20 different categories, from receptionist, news editor, photographer, to program participant. As many as 200 have graced the roster of volunteers at any one time.

Some residents became local TV personalities in contributing their talents as speakers, book reviewers, VIP interviewers, political analysts, health commentators, and program directors. Remembered as appearing over considerable periods of time were Administrator Robert L. Price, Vivian Dietrich, Georgie Davidson, Dr. Frederick
Young, Marian Schwartz, Warren Morgan, Carma Lee Brunner and Alice Lee, to mention only a few.

By 1972 attention to programming had brought a welcome response from the community. Supportive recognition came from the Golden Rain Foundation in a letter from its president, Tracy E. Strevey, advising that “regular open house activity, personal community presentations and visitations to clubs and organizations, as well as programming involved with residents have all contributed greatly to bringing more knowledge and a better understanding of the community.”

Reaching New Goals

Principal attention continued to be given to improvement of programming. A “Leisure World TV Club” was formed, and the “TV-6 Volunteers,” became active. By 1976 resident input had helped create clearly stated objectives for the now widely recognized “RETV-6” (Rossmoor Electric TV-6) to provide:

(1) “Original, educational, cultural, entertaining and newsworthy programs . . .
(2) Local programs oriented to Leisure World residents, supplementing network TV . . .
(3) Current coverage of Leisure World business affairs, as requested
(4) Remote coverage of special events of interest to residents . . .
(5) Programs and advertising . . . conforming to the high standards of the community . . .
(6) A minimum of two hours daily broadcasting (1 hour live) five days a week.

The stated goal was to provide such a scope and variety of TV programs that “at least one general and one special interest program will appeal to every Leisure World resident each week.” By 1970 the two hours daily telecast had increased from one-half hour daily (frequently interrupted) in 1969. The monthly cost, including access to 12 network stations, now was $3.63 to each manor owner — a recognized bargain by comparison with charges being imposed elsewhere by cable television.

In the mid-1970's new equipment to permit use of developing
technologies, gradual expansion of telecasting hours to include programming from 8:00 a.m. to 2:00 p.m., with computer messages appearing during the remainder of the day and on Saturday and Sunday, assured access by residents to the channel 24 hours daily. By 1983 live telecasting of the GRF Board of Directors meetings became a popular program, as did coverage of sessions of the Mutual boards. Residents, nevertheless, were inclined to contrast the quality of programming on Channel 6 with that of the commercial network and public broadcast stations and, without realizing the vast differences in cost between the services, were disposed to be unappreciative.

Gaining Recognition

Taping and rebroadcasting of remote and special events, as well as business meetings within Leisure World, were developments that added interest. The earlier crash of a military plane, brush fires in neighboring hills, warnings of nearby freeway traffic jams — all were local events made visible to residents. As the means of immediate communication to residents, TV-6 service gained recognition as being essential to the entire community.

As the first 25 years of the community's history was coming to a close, a total of 23 stations on 22 channels could be viewed through a cable system extending through more than 250 miles of underground cable, with an estimated replacement cost at current prices in excess of $12 millions. Nevertheless, the entire service was afforded all manors at a monthly cost to the resident of about $8.00 per manor. Residents desiring additional premium channel services, such as HBO and SelecTV, could make arrangements to secure the services directly through Rossmoor Electric.

With this considerable range of services at their fingertips, residents began to appreciate their good fortune as they talked with friends in neighboring communities and with new residents arriving from other cities. They learned that a similar volume of cable TV service, if available, could cost in the range of $25 to $35 or more monthly. Channel 6 of Leisure World, Laguna Hills had arrived — a service to be envied. Moreover, new opportunities continued to be studied for adding other outside channels that are now available.
Fortunate it was for the developers of Leisure World that a strong financial institution was standing by to help ease the way for the influx of early buyers. From the beginning the United California Bank of Los Angeles — (later, the First Interstate Bank of California) — had been closely associated with Rossmoor, its chairman, Frank L. King, being on the Board of Directors of the Leisure World Foundation. As Leisure World, Laguna Hills opened in 1964, the bank already occupied a small office in the new Administration Building, opening on October 1, 1963, the only financial institution then convenient to Leisure Worlders.

This remained the situation for some time. An earlier opening of sales in 1963, had been planned but opposition from the Marine Corps had caused delay. Finally, by mid-February, 1964, sales were opened for Mutual No. 1, a cooperative of 530 units, with a choice of six models, at prices ranging from $12,000 to $24,000 — full price! Within 90 minutes all had been committed. The bank, the only escrow office, could not open escrows rapidly enough. Each buyer was given a number, and then stood in line to open the escrow. The "land rush" had begun! The bank’s small lobby would never be the same again.

It would be seven months before the first of the units would be ready for occupancy. Since the underlying FHA-insured mortgage, initially underwritten by the bank, later purchased by the Metropolitan Life Insurance Company, could be paid off only over a 40-year period, the required investment by the home buyer was nominal. At the most, it could be only the difference between the pro-rata amount of the mortgage and the price of the manor. Many a manor was purchased initially for little more than a down payment of $1,000. No wonder that within a few months an active "resale" market had opened. As the demand built up to obtain the limited supply of completed units, the opportunity to sell at a quick profit did not go unnoticed, and the bank’s handy escrow department was kept busy.

Other financial institutions appeared skeptical. Could this become a stable and affluent community with residents making such low investments? Yet the Cadillacs, the Mercedes, and the Continentals were appearing. People had moved from their large older homes to a retirement with financial ease!
Early Savings Institutions

It was two years after the first sales were made in Leisure World that another financial institution ventured nearby. The Belmont Savings and Loan Association had watched Leisure World develop in Seal Beach. With the opening of the small Alpha Beta Center in March, 1965, it was one of the first tenants — in a store front office — inviting the savings of the rapidly arriving residents. The story is told that on that opening day a man walked into the office to apply for a job. “We didn’t have time to talk to him, but we needed someone to pour coffee for the customers. He poured coffee for four hours. It wasn’t until 2:00 p.m., at lunch break, that we finally got around to hiring him!” Five years later in 1970, this second of the financial institutions to come to the Leisure World area was still the second, but absorbed into the newly arriving Great Western Savings on the opening of its building at the corner of El Toro Road and Paseo de Valencia — the first of a parade of such savings institutions to establish its own building in the soon to develop “Wall Street of Laguna Hills.”

Peculiarly, the next series of openings of financial institution offices occurred several blocks to the east of Leisure World, across the now-completed I-5 Freeway. Apparently, the developing business areas along El Toro Road were viewed as being more profitable sources of money than the retirement community. Here in the late ’60s the Bank of America opened, as did the Royal Savings and Loan Association, later absorbed by Home Savings of America, and Peoples Federal Savings and Loan Association. They were the pioneers in that area.

In the meantime, some savings institutions had begun to feel the financial pulse of Leisure World by advertising for savings via the telephone number of the home office or a nearby branch. In 1972 a dam seemed to burst and the savings institutions began flooding in to the immediate vicinity of Leisure World. From nearby Laguna Beach came Laguna Federal, later Great American First Savings Bank, initially established in a combination of trailers pending construction of its own office building.

Leisure World Becomes Popular

Glendale Federal joined the rush by taking temporary offices while
its Leisure World headquarters office building was erected adjoin­ning the newly developing medical center area. Others followed rapidly; Home Federal of San Diego, American Savings, California Federal, Gibraltar Savings, Anaheim Savings, later United California Savings Bank, and others sought locations as the various business centers developed. In some instances the same institution established more than one branch within the area serving Leisure World.

As the community grew some of the executives assigned to these branch offices, although not necessarily of an age to be eligible for residence in Leisure World, became active leaders in the broadening community. Richard E. Hauptfleisch, as manager of the initial bank, United California, later the First Interstate, and subsequently vice president of Eldorado Bank, became active in organizing the Rotary Club and taking a leadership role in the Historical Society. Rex L. Perkins, as manager of Glendale Federal, became active in organization of the Community Hospital and its money-raising arm, the Associates, at the same time creating “trademark recognition” by traveling about the community in his special golf cart. Adolph Slechta, as chairman of Great Western Savings, came to reside in the community and take an active part personally in the Community Hospital. A number of individuals from Home Federal — both of its San Diego and Laguna Hills offices — were also active in taking over and then continuing the Leisure Worlder of the Month program.

In the early years the banks and the other savings institutions were primarily “depository” offices — accepting the savings of affluent retirees to be loaned out through other branches. Leisure Worlders had no need of loans to finance their cooperative manors; the very low equity was payable in cash. When the condominium units began appearing in 1969 a potential market for loans opened. It was a novel market for lenders, however, and time was required to adjust the Covenants, Conditions and Restrictions of the developing mutuals to insert the legal provisions necessary to satisfy a lender. This was done, and although many manors were purchased for cash, loans became available when desired.

It was not until later years, however, in 1987, that provisions were worked out for loans to be available on the equity of the cooperative units. Equities had grown out of proportion to the total price of the property as the underlying mortgage was paid off and property values increased. Equities were represented by shares in the corporate community, so a loan on the equity was a personal, not a real estate,
loan. Once the loan provisions were agreed upon between lenders, the FHA and the cooperative mutual, loans became available, usually at up to 75% of the value of the equity.

Currently, the financial institutions serving the Leisure World community include 10 banks, 24 other savings institutions, and seven investment securities firms, including some of the nation's largest. The investment and other financial needs of the community are being well supplied.

OUR NEIGHBORS — THE MARINES

Leisure World grew up virtually in the front yard of the U. S. Marine Corps Air Station, known as El Toro MCAS, the principal Pacific Theatre air defense staging center, located only a short three miles to the north. The Marines were a most difficult neighbor in the beginning, an agreeable if sometimes noisy neighbor in later years.

The Marines were very much in evidence when Ross Cortese carved out of the Moulton Ranch the site for Leisure World. The 4,700-acre MCAS had been completed in 1944 in time to play an important role in winding down World War II in the Pacific. It was only minutes flight time south to the Marines' huge Camp Pendleton landing craft training base and the San Diego naval base. Surrounding it were grazing lands and orange groves. The peaceful landscape offered uninterrupted flight patterns for air maneuver training.

Thus, in early 1962, plans to create a new residential community directly astride the incoming flight pattern to the Marine base raised the equivalent of a "red alert." The Marines need not have been concerned; the county of Orange had not yet authorized the creation of a "planned community."

However, Cortese, undaunted, devised a plan with the city of Santa Ana for annexation by way of a 12-mile "strip" along the freeway to the projected new community. Santa Ana already had provided for "planned community" zoning. All was going well until reports were circulated that the Marines' landing patterns might be changed to permit flights over the city of Santa Ana if the new community were to be built. Annexation to the city of Santa Ana was soon denied!

Shortly, however, the county adopted the ordinance authorizing planned communities. The first applicant was Rossmoor on behalf of Leisure World. The application would not be passed upon
favorably until agreement was reached with the Marine Corps. The next step was to obtain Federal Housing Administration (FHA) approval in order that its insurance of home mortgages would be available to residents. Approval, first granted, was later withdrawn. Building permits were not being granted by the county; the Board of Supervisors advised that they could not be granted until objections raised by the Marine Corps were satisfied. The situation was becoming critical. Costs were accumulating at a rate well above $1,000 a day.

Marine Corps Restrictions Prevail

The Marine Corps required agreement to certain restrictions. In order to meet them, plans for the golf course would be changed to place it within a 4,000-foot-wide strip under the landing flight pattern, with no residences within that zone, restricted principally to recreational purposes. One year had gone by when, on February 12, 1963, an agreement was reached. One month later, on March 19, a “Declaration of Restrictions” was filed in the county records to be in effect for a period of six years, subject then to reconsideration. A total of 709 acres was restricted, including an area of about 180 acres to the south of El Toro Road that would remain undeveloped pending further review of the agreement. A letter renewing FHA’s approval arrived. Building permits, long delayed, were issued by the county. A battle had ended but the war would go on.

At last, Cortese was free to proceed. Plans had been drawn, model residences constructed, roads widened and built, administration headquarters completed, and the first clubhouse under construction. Another year would be consumed and a total of $15 millions poured into the project before sales were opened on March 20, 1964, and in a period of 1½ hours the total of 540 units in the first mutual would be committed.

Marine Corps surveillance of development in Leisure World continued, according to documents revealed in a decision by the United States Court of Claims on December 28, 1972. That decision resulted from an action filed earlier by Rossmoor, asking compensation for the restrictions that had been placed upon the land by the “Declaration of Restrictions” filed in 1963.

The court record was critical of the actions of Colonel Evans
Carlson, the then assistant chief of staff at El Toro, "who spent practically every working day from about June, 1962, until the execution of the 'Declaration of Restrictions' in March, 1963, directing the attack against the developer of Leisure World." Opposition continued, the court said, "as the Navy and Marines raised a series of objections in total disregard of their covenant in the Declaration of Restrictions."

Compensation Paid For Restrictions

The court recited in detail factors that had contributed to its conclusion that Rossmoor had been "clubbed, coerced, forced and even sandbagged" by government actions to enter involuntarily into the agreement restricting the use of the land. It found that the "diminution in fair market value" as a result of the restrictions amounted to $2,706,000, and with interest at 4 1/2% during the period, the award was $4,200,000. Cortese had been granted compensation, as the court said, for "an inverse condemnation cause" yet some of his remaining property, i.e., that portion under the flight pattern on the south side of El Toro Road, could be developed only within the terms of the restrictions now continuing in effect.

Sentiment within Leisure World unquestionably was favorable to the property remaining restricted to recreational uses. In this, the Marine Corps position was supportive. Some residents were positive that sales representatives had assured them that the area was reserved as a "greenbelt" but proof was lacking. As the time neared when Leisure World would be completely "built-out" with residences, there would remain within the county "General Plan" for the community seven parcels of property owned by Rossmoor in locations within the restricted flight pattern and, therefore, unavailable for residential development. Clearly, the location of small parcels at highway intersections were destined for business development, but the Marines remained adamant that safety considerations precluded the lifting of restrictions.

In mid-June, 1978, rumors surfaced that negotiations were under way for development of a "Business Park" in the "greenbelt" area. By June, 1980, a definite plan for development by the Koll Company, a major business and industrial complex developer in nearby Newport Beach, was ready for consideration by county authorities. The Marines could not agree to the plan; too many people would be working within the flight zone. The county Board of Supervisors
would not consider any zone change until Rossmoor and the Marines could reach agreement.

The proposed development was modified to create a four-building "professional office center" put forward in June, 1981. By now, Rossmoor was the "Rossmoor Liquidating Trust," having completed the last of the Leisure World manors, and was preparing to dispose of property remaining within the planned community. In the meantime, in 1980, Rossmoor had transferred to the Golden Rain Foundation, for a consideration of $1.00, an 18-acre parcel extending along Moulton Parkway south of the intersection with Santa Maria, a potential recreation area. A mutually beneficial exchange also had been arranged by GRF obtaining at Gate 7 a golf-cart pathway of 3,385 square feet leading to the golf course, and in return ceding to Rossmoor an area of 3,484 square feet of unused golf course property at the corner of El Toro Road and Moulton Parkway, a potential corner business plot.

Business Park Opposed

Questions raised by the modified office park proposal were debated at length in Leisure World. In August, 1981, the GRF board of directors authorized a letter in support of the proposal but there was a lack of community support. The debate dragged on. By mid-1983 the proposal was ready for official consideration by the county. Leisure World changed its position, all of the governing boards joining in protest, citing dangers of increased air pollution, traffic congestion, and loss of open space to the community. Hearings were scheduled but the county Board of Supervisors on November 1 instructed the Planning Commission to refuse to consider the proposal. Rossmoor appealed that action to the county Superior Court, but on April 26, 1984, the court denied the appeal.

Rossmoor in the meantime had filed an action in the U. S. District Court to seek relief from the restrictions imposed by the agreement with the Marine Corps. That action dragged on in the courts until 1988 when a negotiated agreement with the Marine Corps was submitted to the court for confirmation. It would retain a center zone of 1,000 feet in width restricted solely to recreational purposes, with three 500-foot supplemental zones on either side that by degrees released some of the prior restrictions. The Marines would be awarded some $8 millions, representing the amount received by Rossmoor.
in 1963, plus interest accumulated in the interim.

After 25 years of contention, the parties awaited the court’s decision. Not to be unduly delayed further, Rossmoor Liquidating Trust, in collaboration with a new developer, Cabot, Cabot & Forbes, submitted to the county an ambitious proposal for a Business Park, a retail business center, and a shopping center. That proposal remains under negotiation in 1989.

Throughout the years of contention between the Marine Corps and the developer of Leisure World the Marines remained good neighbors and friendly collaborators with the residents. The only accident within the community involved two planes flying in from Bennett Field, New York, on the fog-shrouded Sunday of January 27, 1967. The pilots, unfamiliar with the area, and with one radio malfunctioning as the other pilot attempted to guide the companion plane to the landing strip, the two planes touched and crashed, hitting two manors. Five people died, including one pilot. Neighboring residents rushed to the rescue of others trapped in the buildings, and the fire department was on hand almost instantly. The manors were rebuilt without delay, the only evidence of the accident to remain being an aircraft engine that lies buried in the ground near 272 Avenida Sevilla.

During the period of Leisure World’s infancy the cities to the north in Orange County were becoming active business centers. The single commercial airport in the county, named after a Newport Beach favorite son, the actor John Wayne, was reaching the limits of its capacity. Already, adjoining potential areas for expansion had been built-up.

Oppose Commercial Use

The eyes of the business community turned toward the Marine air base. If Congress could be persuaded to push the Marines out, or if the Marines could be persuaded to restrict their training activities to provide space for commercial flights, the location could satisfy the immediate need. The Marines were not happy at the prospect; they foresaw the sharing of space with commercial flights, if practicable at all, to be “the camel’s nose under the tent” to a complete takeover. Leisure World shared that view; moreover, commercial flights within the flight pattern would become a day-and-night noise nuisance.
Over a 20-year period, between 1968 and 1988, a total of seven official surveys have been made analyzing as many as 13 potential airport sites. Always included was the potential of the El Toro MCAS. Federal investigations at three different times found that joint use of the base would be “technically feasible” but not practicable. In 1989 an officially designated, county-wide “Airport Site Coalition,” partially funded by the FAA, was seeking to reach a consensus on a solution. The Marines and Leisure World were among those collaborating to assure that the El Toro MCAS would not be the designated “solution.” Leisure World had become a principal participant in another coalition, of homeowner associations and communities, to oppose the conversion of the Marine base to commercial use. The outcome will be known only in future years.

Leisure World and Marine Corps officials and administrative personnel have been frequent collaborators throughout the years. Patriotic occasions in the community called for a Marine presence — speakers and the popular Marine Corps Band, always an attraction. The many veterans who had found a retirement home in Leisure World were welcome at the Marine post-exchange and could be accorded privileges on the base golf course. Marines returning from Vietnam in the late 1960’s frequently were greeted by a “Welcome Home” group of 300 Leisure Worlders, some of whom would journey to the base at all hours to meet the planes and offer a cheery word and doughnuts, coffee and orange juice to the weary veterans.

The proximity of the two disparate communities — the dynamic Marines and the retired Seniors — would seem to be fraught with danger and discord. However, one resident expressed the thoughts of many in stating: “We have learned to live with them and they have learned to be considerate of us.”

LAWSUITS AND LESSONS

“Whenever property is involved dissension will occur.” The record of Leisure World contains interesting examples of this truism. It could be said, further, that dissension frequently leads to a lawsuit, and from a lawsuit a lesson usually is learned.

Six months after the first residents appeared the management company, Leisure World Foundation, on March 17, 1965, initiated a “house organ,” the Leisure World News. It was edited by the Foundation staff, being the particular responsibility of Carlton J. Smith
as editor, and was distributed by carrier to residents as they moved into their manors. As the community grew the publication gained in value. Its circulation increased and the business community responded with advertising. In March, 1972, the now recognized "community" newspaper was sold to the Golden West Publishing Corporation, owned by some of the officers of Leisure World Foundation, being also the publisher of additional local newspapers in the area. Its status as a free distribution service to residents was continued.

Enter the News-Post of Laguna Beach, published by Vernon R. Spitaleri, with a Leisure World edition which it desired to circulate free to Leisure World residents while seeking subscriptions at a price. This ran counter to the GRF policy that prevented solicitation or distribution of material within Leisure World, this being private property, with no public thoroughfares. Thus the Laguna Beach paper was dependent upon use of the mails both for delivery and solicitation, a much more costly procedure. The fact that the Leisure World News, not owned by the residents but by a private publisher, was permitted distribution rights within the community provided a basis for "freedom of the press" issues to be raised. Golden Rain Foundation found itself in the middle of a public policy dispute between the two publishers.

As the newspapers used their columns to voice their respective viewpoints, the battle of words continued until 1973 when the owners of the Laguna Beach paper filed suits against both the owners of the Leisure World News and GRF, making various allegations, including restraint of trade, by virtue of the GRF policy. The defendants counter-sued, the case going to the Orange County Superior Court. After more than four years in the courts, a five-month trial and six days of deliberation, a jury decision on April 27, 1978, held in favor of GRF and the Leisure World News, granting the newspaper $5,000 actual damages and $50,000 punitive damages for unfair business practices by the Laguna Beach publisher.

The News-Post appealed, alleging that its freedom of the press rights had been violated when it had been prevented by GRF policy from delivering its newspaper door-to-door in Leisure World. More than five years later, after the exchange of claims and counter-claims, GRF settled the case by payment of $1.85 millions to the Laguna Beach publisher. It had been a costly lesson for successive GRF boards of directors in determining what policy to pursue.
Clubhouse 4 Access Dispute

A peculiar dispute reached a climax in 1973 as Clubhouse 4 was nearing completion. The clubhouse had been in the design and planning stages for five years. It was to be erected near the northern boundary of Leisure World, the site already surrounded by a cluster of Garden Villa condominium apartment units. Access to the clubhouse was to be via a driveway leading off the area street — Via Mariposa West — a driveway serving the cul-de-sacs providing vehicle access to the residential buildings.

Residents were alarmed that anticipated traffic to the new clubhouse would overburden the narrow and winding access route which, they alleged, was private property of the Mutual in which the buildings were located. Investigation disclosed that two years earlier, on October 29, 1971, Rossmoor Corporation and its subsidiary, Oaklawn Homes, had granted to the Golden Rain Foundation an easement over the driveway prior to the time the Mutual had been organized. Residents of the buildings threatened legal action.

Earlier, residents had proposed a route off Moulton Parkway, bordering on the golf course, but it would be a cumbersome entryway, and the idea was dropped. The possibility of creating a gate to provide entry off Ridge Route Road was considered but found to be impracticable because of county restrictions that would apply. Finally, on December 28, 1972, the resident group filed an action in Superior Court; Black, et al, vs. Oaklawn Homes, Inc., Golden Rain Foundation, and Rossmoor Corporation, et al., contending that the granting of the easement to GRF had been illegal. Defendants demurred but were overruled and the case permitted to go to trial. On April 24, 1981, the court dismissed the complaint for failure to bring the case to trial within prescribed limits. The easement and the route of access remained.

The Towers vs. Rossmoor

Mutual No. 50 had been initiated in December, 1969, for the purpose of creating a high-rise apartment-hotel type structure that would become a “full-service” facility for residents who no longer wished to be burdened with housekeeping. Originally planned to be erected in the area of Gate 3, it went through various stages of
design before its completion and formal opening as “The Towers” on November 15, 1974, at Gate 10. Its 311 condominium units offered deluxe living accommodations, with card rooms, two dining rooms, recreational facilities, a Great Hall or theater, and an aura of magnificence.

In dry weather all was well. When the occasional winter storms arrived there were complaints of roof and balcony and lower-level leakages. The repairs became burdensome and in April, 1977, the Mutual filed a complaint in Superior Court against Rossmoor Corporation, Oaklawn Homes and Ross W. Cortese charging negligence, fraud, misrepresentation, and breach of warranties. The claim was for compensation and for punitive damages of more than $3 millions. A month later a week-end storm of May 7-8, 1977, emphasized the prior complaints by adding more damage to 17 units.

In July an announcement of pending reorganization of Rossmoor Corporation into separate units alarmed residents that the move might “insulate each operation from risk factors” of other units and result in residents being unable to collect anticipated damages. A group of 11 residents filed a supplemental “class action” suit on behalf of all residents, seeking to hold each of the named defendants ultimately responsible. On September 19, 1977, attorneys for the contending groups, after numerous conferences, proposed that a settlement agreement be reached by arbitration to avoid a lengthy court trial. A retired judge, Richard B. Ault, was agreed upon as arbitrator. A settlement agreement was reached on August 11, 1978, and final amendments and special findings of the arbitrator on November 9, 1979, brought the case to a close.

Specific awards in arbitration exceeded $1 million, diminution damages for construction specifications that had not actually been built were set at $373,000, and additional costs of waterproofing brought the total award to approximately $2 million. The residents had won after three years of contentious arbitration.

The Startling Huhn Case

Leisure World always had taken pride in its various security measures to protect residents against dangers from the “outside” as well as from accidents within. Residents felt secure. Yet there were occasional reports of marauders gaining admission and of minor losses from manors, some of them subsequently recovered as having been
misplaced. Thus residents were startled to learn of the filing on July 2, 1982, of a case in Superior Court claiming loss of jewelry valued at $210,000, asking an additional $200,000 for emotional distress, and demanding $5 millions in punitive damages. The case was filed by a resident, Rose H. Huhn, and became known as Huhn vs. Golden Rain Foundation, PCM, Inc., et al. Claimed was failure of the defendants to provide adequate security, resulting in the plaintiff having suffered substantial damages.

Such a claim had never before arisen and the defendants could not believe that the claim could be supported. A jury trial was demanded by the plaintiff. The case did not go to trial until March and April, 1984. The jury verdict awarded the plaintiff the $410,000 claimed for general damages, $150,000 against ORF in punitive damages, and $500,000 in punitive damages against PCM. Such a decision could not be allowed to stand. The defendants appealed to the Fourth District Court of Appeals and on June 26, 1986, the court granted the general damages but denied punitive damages.

In the meantime, the alleged burglar by the name of Thos. Valli, had been apprehended and tried. In the trial it was disclosed that he had worked for a carpet cleaning company, that he had arranged on periodic occasions to borrow from a friend having access to Leisure World a commercial gate pass that admitted him in the evening hours. Then by stealthily watching lights go off and on in selected manors, he had been able to enter the manor. He was sentenced to five years in prison.

It was disclosed also that Leisure World security forces had become aware of the periodic burglaries as reported by residents, had brought in sheriff's deputies, had developed plans to apprehend the burglar, and finally had done so. In the meantime, the Huhn complaint had arisen. Security had been quietly pursuing its solution, expecting to apprehend the culprit, but had not disclosed the situation to residents in the belief that the thief could be more readily caught. The experience did result in tightening of security measures. Gate passes of commercial purposes were carefully reviewed. Evening passes became suspect and were withdrawn unless a definite need were shown.

Consideration also was given to suggestions for homeowner associations generally to help avoid or limit liability for crimes committed on their premises, including:

(a) immediately notify residents of crimes committed in or affecting
the premises;
(b) provide adequate security measures and revise them when the need increases;
(c) properly maintain the security measures that are implemented;
(d) consult qualified security analysts to review adequacy and keep records to document such efforts;
(e) avoid representations concerning adequacy of security measures unless they have solid basis in fact, and
(f) maintain adequate liability insurance to protect the association.

Fortunately for Leisure World its insurance coverages were adequate to protect against loss. Nevertheless, the fact that a resident would seek punitive redress of a grievance rather than confer with the authorities was a warning signal that management did not overlook.

Care With Service Contracts

Misunderstandings over service contracts in business inevitably arise. Leisure World has been fortunate in keeping them to a minimum. Two examples are of record. In 1979 it had become apparent that the accounting system was overburdened; a major overhaul should be considered. A proposal was submitted by Bradford National Corporation, an affiliate of McDonnell Douglas Corp., with headquarters in New York City, but with a branch office in Los Angeles and other cities. It was a substantial organization, having developed and was continuing the operation of, computer-based accounting and management reporting systems for many large nationally known businesses.

After lengthy negotiations, an agreement was entered into on October 5, 1979, by PCM, as the agent of Golden Rain Foundation. The system — “Accounting Management Information System” — customized to meet Leisure World requirements, would be installed over a period of 18 months, and the continuing operating agreement would extend for an additional three years. It was not until December 31, 1981, that the new system was declared by Bradford officials to be operative. PCM discontinued its existing arrangement and the new system was on line on January 1, 1982.

The next three months, according to court records, was spent by PCM employees “attempting to help BNC extricate itself from the morass.” The system simply did not work. Records became confused.
Notice of termination of the agreement was given on June 16, and arrangements made to return to the previous system.

On August 6, 1982, GRF filed suit in the U. S. District Court against Bradford National, et al, asking $1.2 millions general damages, $1 million consequential damages, and $50 millions punitive damages. Numerous conferences had been necessary both in New York and locally to try to make the system operative, but it was made clear that Bradford employees simply had been incapable of accomplishing their tasks. An “Agreement of Compromise, Settlement and Release” was signed on November 2, 1983, awarding GRF $1 million. The book was closed on December 12 with dismissal of pending court actions.

Another case filed in Orange County Superior Court on September 26, 1983, involved a claim by a rubbish collection firm against GRF, the mutuals and PCM as their agent. “Rent-A-Bin Two” was a successor to Toro Disposal, Inc., which had provided rubbish collection and disposal services to Leisure World for several years prior to March 1, 1982.

Before that date Toro had served under an oral agreement. PCM had called for written bids to be submitted, proposing a five-year contract. Toro had submitted what it understood to be the low bid, but other requirements of the contract remained to be settled. Proposed contract forms had been passed back and forth between the parties but none had been signed pending resolution of the contract details.

Monthly bills for service rendered had been submitted at prices in effect prior to the bid. PCM had marked out that amount and had substituted the bid prices. Toro had cashed the checks drawn accordingly. Then, on March 1, 1982, PCM had entered into a contract with a competitor, Solag Disposal. Toro sued for the difference between the payments received and the amounts billed, claiming $116,947.70, and $1 million general and special damages.

The case languished in the courts for more than four years. On May 21, 1987, a settlement in compromise was reached awarding the claimant $66,000 for services performed, which was an obligation shared among GRF and the mutuals. It had been an unfortunate dispute. During the period when the misunderstanding arose the parties simply had made assumptions without reaching and communicating an agreement.

Few Leisure World residents throughout the years have known
that the community barely missed becoming a part of the incorporated city of Santa Ana. As mentioned previously, this was in 1962, as Rossmoor was seeking permits to create the "planned community" of Leisure World. Orange County had made no such provision. Santa Ana, as the county seat, already had provided for planned developments within the confines of its city limits. Only if its boundaries could be extended southward through the agricultural lands of the Irvine Ranch could it embrace the newly proposed planned community.

A precedent to do so had been set many years earlier when the city of Los Angeles had wished to become a seaport. Unfortunately, the water was 20 miles distant. It had persuaded the state legislature to permit cities to annex strips of property along highways to reach the desired area and thus create a "contiguous" city area. The ever-alert Ross Cortese proposed to Santa Ana officials a similar plan; a "strip" following the freeway to Leisure World would provide the connecting link. The plan was looked upon favorably in Santa Ana and negotiations progressed to the stage of preparing the necessary ordinances. The Marines learned of the plan. They organized opposition and it was pigeonholed. The county, instead, adopted the necessary ordinance to provide for planned communities. Leisure World would be built in unincorporated territory.

Cityhood remained far from the thoughts of community leaders in the sparsely settled Saddleback Valley. Rather, the need for communication between developing homeowner associations was seen as real estate activity continued. Leaders in Leisure World could not ignore the potential impact on their community of the expanding population and commercial growth. In July, 1968, a few leaders in Laguna Beach invited discussions with homeowner groups in the Valley. Early participants from Leisure World were Robert L. Price, the administrator, Mary Cornelius and Glenn Wineman.

**Saddleback Area Coordinating Council**

It was these individuals who initiated the formation of the Saddleback Area Coordinating Council in cooperation with leaders of other groups in the Valley. The various Leisure World mutuals, GRF, and clubs and organizations became active members. It became a council of organized civic groups. Its objective was to "maintain the high character of the Saddleback area through exchange and
dissemination of vital information” to the county authorities.

By 1973 it had joined with economists at the University of California, Irvine, and a professional planning organization to use a Federal grant of $26,000 to survey the Saddleback Valley area. A 32-member study team met weekly over a period of seven months as the survey was undertaken. A 70-page report made recommendations for a county general plan to be adopted for the area, guidance on ground traffic policies, limitations on air facilities, restrictions on housing development, preservation of the environment, and the creation of citizen review committees.

It cannot be said that the proposals as outlined materialized. Nevertheless, the Council became influential in its policy recommendations to the county board of supervisors. Its planning review committee met frequently, studying all proposals and making its recommendations to the planning commission and to the board of supervisors. Many Leisure World leaders took an increasingly active part, including over a period of time, Wallace Filson, Frank Lovett, Irene Puhlmann, Henry Beaudry, Frank Schaefer, Sarah Lederer, Alfred Driscoll, Milton Adamson, and others.

As the various communities within the Valley moved toward incorporation as cities, however, the Council influence tended to dissipate. Leisure World leaned more upon its own “Area Project Review Committee” to continue surveillance over activities in nearby areas that would directly impact the community. The Council had served its purpose in creating a “voice of the community” in speaking to the county authorities, but separate voices were taking its place as the decade of the 80s evolved.

It could be said that the residents of Leisure World were happy with their status quo, both within their gates and in their relations with the county as the governing body of the unincorporated areas outside. While “their” member of the county board of supervisors had only one voice among five, his was an influential voice; “Tom” Riley devotedly watched over his expanding constituency in Leisure World and spoke for them.

Spectre of Incorporation Appears

The first indication that another city might covet the closely knit community came in 1973. A rumor circulated that Laguna Beach had proposed that the area of Leisure World be included in its
“sphere of influence.” The rumor proved to be in error but it was determined that such a suggestion had been made informally by officials of the county’s “Local Agency Formation Commission” (LAFCO), the body charged with reviewing proposals for incorporation of a city. Leisure World’s leaders were alerted; a “sphere of influence” could be the first step toward incorporation or annexation of an area. The reference to inclusion of a part of Leisure World was officially dropped.

Nevertheless, Leisure World was alert to the possibility that a city could be formed in an adjoining area by drawing its proposed boundary lines around the contiguous community and could include it within the city against its will. By 1979 a decision had been reached to employ a consultant firm, Ralph Andersen & Associates, to prepare guidelines for the community were it to be faced with any one of the possible methods by which it might be forced into incorporation with another city or might choose to incorporate separately. The investigation was to be a purely defensive move to provide authentic information for the community.

The report was filed in mid-1980. It pointed out that incorporation of Leisure World alone would be impracticable except as a defense against absorption by another city contrary to residents’ wishes. One city could not arbitrarily absorb or annex another. Furthermore, since Leisure World, in effect, was a self-governing community, there would be no point in adding another layer of government. Likewise, such a move likely would prove to be uneconomic since Leisure World permitted no commercial business and there would be no sales tax revenue, the prime source of income to a city.

In the event the community desired to become a part of a city, however, three choices were open: (1) it could agree to annexation by an adjoining city having a contiguous boundary, which would be either the city of Irvine or Laguna Beach, or (2) it could be absorbed by a city in formation; i.e., the Saddleback Valley area, if the proposed city boundaries were drawn to encompass Leisure World, or (3) it could apply to form a city which would include contiguous unincorporated areas containing commercial enterprises to provide a sales tax base. The report had given the useful information desired and was filed for future reference.

The value of the report soon became apparent. Proposals were made by commercial interests in the Saddleback Valley to create
a city encompassing the entire valley, including Leisure World. The community wanted no part of that proposal and energetically made its views known. Its residents would be a small minority interest in a sprawling city. By the end of 1980 the project had disappeared from view.

Incorporation Proposals Become Active

Early in 1981 the Rossmoor Corporation was preparing to liquidate its remaining holdings, including the so-called “greenbelt” area under the flight path of the El Toro Marines. It was learned that negotiations were underway by Rossmoor to regain rights to build a commercial “professional office center.” The proposed builder, the Koll Company of Newport Beach, was a successful and influential developer of business parks. However, the negotiations were getting nowhere; the county would not approve the project without agreement and release by the Marines.

Rumors circulated that the City of Irvine was interested in annexing a strip of property along Moulton Parkway to reach the proposed commercial center, thus placing it under the jurisdiction of the city, with the possibility that approval of the project would be granted. Unfortunately, the strip would divide Leisure World into two parts, destroying the unity of the community.

This was unthinkable. Leisure World leaders sprang into action. John W. Luhring, a retired attorney and banker, accepted the chairmanship of the committee on incorporation. An area was mapped out approximating the extent of County Service Area No. 4, but fixing Paseo de Valencia on the east as the boundary, eliminating the Laguna Hills Mall. The required petition for incorporation was submitted to the county board of supervisors and approved, thus avoiding the necessity of circulating petitions to residents. Nevertheless, petitions were prepared and an army of nearly 300 residents went door-to-door. In two weeks time more than 50% of registered voters in the community had signed — twice the number required. The proposal now was ready for hearing by LAFCO.

In October, 1982, there no longer appeared to be a need for haste. Irvine was studying further the feasibility of its annexation proposal. Assurance was given soon that the proposal had been dropped. In the meantime, the issue had become a cause celebre in Leisure World — widely acclaimed — but as it appeared shortly, it was a purely
defensive response to a threatened incursion by Irvine. By the end of 1983 the petition to LAFCO had not been acted upon and was allowed to lapse.

Valley-Wide Proposal Looms

In 1985 the proposal for a valley-wide Saddleback City again came to the fore. A cityhood Study Council was active, backed largely by commercial interests on the east side of the San Diego Freeway. It was working on a long-term plan, assuming that the effort might not come to fruition for five or more years.

In 1987, however, the sponsors were ready to make their move. Petitions were circulated within the area east of the freeway but the citizens were resistant. It was discovered that a small water district in the mountains to the east included within its boundaries a small sector of the proposed city. The water company, a public entity, agreed to petition the county authorities to approve the boundaries of the proposed city, as permitted under state law, thus obviating the signing of petitions by the registered voters. The petition for approval of “Saddleback Valley City” was now before LAFCO for consideration.

Suddenly there appeared the “Citizens To Save Laguna Hills” movement, quickly organized in the southern area of Laguna Hills. It was adamantly opposed to being included within the proposed boundaries. The group wanted to create the City of Laguna Hills to embrace the area on the west side of the freeway, preferably including the territory between the City of Irvine on the north and the newly approved City of Mission Viejo on the south. There was one problem: Leisure World lay between two sections of the proposed area. The two sections could not be joined to create a single municipality without the participation of Leisure World. There could be no immediate solution since Leisure World could not yield any of its territory. The CSLH reduced its proposed area to a northern boundary at Paseo de Valencia, thereby avoiding the dilemma that Leisure World presented, but retaining the Laguna Hills Mall.

Difficult Decisions Faced In Leisure World

Leisure World faced potential problems and needed to study its alternatives. Both city proposals would leave it unincorporated but
not unscathed. A very limited tax base would remain in the area outside its walls, leaving Leisure World to meet added costs of the county service area. Three study groups were given assignments with instruction to report back by March, 1988, to the official boards of directors. Alternatives were listed as: (a) do nothing — remain as is; (b) incorporate to include as small an area as feasible, i.e., County Service Area 4; (c) seek annexation to City of Irvine; (d) seek annexation to Laguna Beach; (e) join in the Saddleback Valley City proposal; (f) join in the city of Laguna Hills proposal. Alternatives (c) and (d) were soon found not to be practicable.

When the reports were completed numerous meetings of the committees and governing boards were held. Little time remained. Hearings had been set by LAFCO for early April. What to do? There was no time to conduct discussion sessions among the 21,000 residents. The issues were difficult to comprehend. Delay was requested of LAFCO — and granted.

At a special meeting of the GRP board of directors on May 31, 1988, after having reached agreement informally among the directors of the mutuals, the Board voted to join in a request to LAFCO to include Leisure World within the boundaries of the proposed City of Laguna Hills. The decision was formalized by the mutual boards. Community meetings were called and it was assumed that large numbers of residents would appear. Much to the surprise of the leaders, the meetings attracted no more than 100 to 200 residents, of whom many were directors and the same proponents and the same opponents at each meeting. Seeking an explanation for the seeming lack of interest among residents in what directors considered to be a most consequential issue, the directors could only reach the conclusion that residents preferred to leave the decision on such a complex issue to their chosen representatives on the official boards.

The postponed hearing before LAFCO was reset for June 22. Both proposals — Saddleback Valley City and Laguna Hills City — were set for hearing at the same time. The Laguna Hills request was heard first. It was denied “without prejudice” to be scheduled for further consideration on December 7, 1988, in the event the Saddleback Valley incorporation should fail to receive a majority vote at the forthcoming general election in November.

The Saddleback Valley petition then was approved, subject to decision by the voters at the election in November. Leisure World found itself in the position of remaining on the sidelines until the
Residents enjoy (above, l. to r.) lawn bowling, swimming, shuffleboard, bocce ball, diving, billiards.
Campaigning by proponents and opponents within the confines of the proposed Saddleback Valley City continued at a furious and sometimes bitter pace. Many of the Laguna Hills residents whose homes were within the proposed Saddleback Valley City continued to lead the fight in opposition. In the end, the proponents lost the election. The Laguna Hills application was now up for consideration.

After two postponements and an adverse report and recommendation by its staff, LAFCO approved the application for a City of Laguna Hills by a vote of 4 to 1. The Board of Supervisors subsequently gave its approval by unanimous vote and placed the issue on the election ballot for June 6, 1989. Leisure World was included within the boundaries of the proposed city and for the first time found itself scheduled to vote on an incorporation proposal that would include the Laguna Hills Mall as well as the unincorporated area immediately surrounding.

The area proposed to be incorporated would be a smaller city than either of two unincorporated areas nearby that prospectively could seek cityhood in the future and could covet Leisure World — Saddleback Valley to the east and Aliso Viejo to the west. Should Leisure World choose to become a part of the smaller city now? Or should it take a chance on the future and await the possibility that it might be drawn into one of the larger cities of the future? The decision could be made only at the June 6 election. The publication of this book could not await that date. The news of the outcome will come from another source, but whatever the outcome, Leisure World continues as the unique community that began twenty-five years earlier.
Imagine arriving in Leisure World, Laguna Hills, at any time, the early years or the present, and a resident of a mutual housing corporation, belonging to an umbrella corporation called “Golden Rain Foundation of Laguna Hills,” and your simple question is: “Who is responsible for maintaining this place?” The answer: “If you live in a cooperative housing corporation, we will be responsible for maintaining all the exterior properties, in their respective areas, as well as certain clearly defined interior fixtures, appliances or components, but if you live in a condominium housing corporation we have no responsibility for the interior, or is it up to the inside wall? Why don’t you read the documents? They will tell you everything!” Does that sound familiar?

Thus began the complexities of developing the various maintenance programs in the community. As the real estate in the cooperative type mutual housing corporations was owned by the respective housing corporations, not by individuals, the mutual’s maintenance staff was small in numbers and was part of the then named “Physical Properties Department.” Much of the early maintenance was provided by developer subcontractors as part of a warranty procedure. The first budget for the community wasn’t prepared until 1965 for the 1966 calendar year.

Building Maintenance

As more and more mutuals joined the community, it was recognized that careful evaluation was required to determine what would be corporation responsibility, resident responsibility, what types of tradesmen would be required to perform the various services and functions, and how we would collect the costs to bill the appropriate or resident owner for maintenance work. Careful analysis
determined the following types of functional staff were needed:

1. Plumbers
2. Appliance men
3. Electricians
4. Carpenters (Roofers)
5. Painters
6. Janitors

The community leadership recognized that despite the newness of the community, appliances would need repairs, water heaters would leak, light bulbs would need replacement, and roofs would leak. The community was fortunate in the early years to be described as a gold-medallion, all-electric community serviced by Southern California Edison. Literature described us as the first of this type of community. The developer, Rossmoor Corporation, entered into an agreement with General Electric to provide all of the appliances (i.e., refrigerators, ovens, and ranges) to the cooperative units. The first few years marked excellent cooperation between these two business giants with community management following through on minor repairs and replacement of products that were not meeting the standards.

Of course, the Federal Housing Administration, which made the original loans available to the community for the construction of units, had an inspection team constantly on the project, which assisted in making sure specifications and standards were met when every home was built.

During 1964 it was recognized that warranty periods would not last forever and a maintenance operation would have to be organized. Rossmoor Leisure World, Laguna Hills, promised new residents that a maintenance staff was available to service and take care of the maintenance needs and problems. Management had the responsibility of hiring the appropriate service personnel.
Unionization

At the outset of construction of Leisure World, Laguna Hills, by the Rossmoor Corporation, many construction trade unions were represented by the Building Trades Council. Of course, during the 60's unions enjoyed high visibility and each construction union would demand complete jurisdiction over its particular trade: i.e., plumbers could only do plumbing, electricians could only do electrical work, and carpenters could only do carpentry. The Building Trades Council fully intended to carry these various unions over to Leisure World, Laguna Hills, which would have mandated the then managing agent, Leisure World Foundation (later in 1972 to become “Professional Community Management”) to negotiate with eight to twelve various unions. This concept was bitterly opposed by the Leisure World Foundation, representing community interests. It was the contention of the Leisure World Foundation that maintenance employees need not adhere to construction employees’ union policies.

After considerable opposition from the Building Trades Council, negotiations were completed with International Laborers’ Union to cover all maintenance employees at Leisure World, Laguna Hills, under one collective bargaining agreement. At this same time, delegation of the agreement was made by the International Laborers’ Union to the Santa Ana Local No. 652. This agreement was signed during the later part of 1965. Without question, the strategy of one bargaining unit, instead of multiple trade bargaining units, has been helpful in minimizing labor disputes and in saving dollars to the community.

Cooperatives

Those who moved into Rossmoor Leisure World, Laguna Hills, from 1964-1968 purchased a cooperative unit from Rossmoor. From a building maintenance perspective, much was promised to a buyer. For a low monthly maintenance fee, the new owner would receive many diverse maintenance services, all included in the monthly carrying charge — for instance, all appliance repairs, water heaters, and garbage disposals. Additionally, window screens, sliding door screens, kitchen tile, bathroom, and many other interior structural components were the responsibility of the housing corporations and
shared by all who moved into the community. In addition to the maintenance of the interior of each dwelling unit was the exterior building maintenance. It must be remembered that the building plans at this time provided for either four attached, six attached, or eight attached units. So there was not great diversity in building sizes and/or styles.

The housing corporations were responsible for exterior maintenance, which included roofs, painting of the exterior only, streets, cul-de-sac repair, and carport repairs. Of course, janitorial services were offered to take care of the various shared laundry facilities and the two-story stairwells and breezeways. Perhaps one of the most accepted services offered from the early years of the cooperative concept has been the interior maintenance program, which is responsible for an interior manor inspection every two years. Its responsibilities include cleaning under the refrigerators, caulking tubs and showers, cleaning range and exhaust fans, replacing certain filters, and other minor adjustments to the various interior components owned by the mutual housing association. Each year 3,162 dwelling units are inspected as described above.

Condominiums

When the condominiums were first constructed in late 1967 for occupancy in 1968, everyone was concerned as to what this type of living would mean to the cooperative concept. The major reason for the change was that of financing, and it was generally assumed that the sharing of maintenance costs was impractical because no longer would the housing corporations be responsible for the interior of the dwelling units. In fact, the original “Covenants, Conditions and Restrictions” of original Mutual No. Twenty-two, the first condominium mutual housing corporation, were very clear as to the individual owner’s responsibilities for the interior components of a unit. Of course, the major difference was that no longer would replacement reserves need to be established for appliances. For instance, refrigerators would be the responsibility of the owners, not the housing corporations to be formed. For that matter, ovens, garbage disposals, dishwashers, and water heaters all would be maintained and replaced by individuals, not the corporation, thus reducing the monthly maintenance costs of the mutual immediately. Structural interior components would be treated much the same way in
that the individual owners would decide when, why, and what to replace, with regard to their individual concerns, when something needed maintenance. A closer look at these governing documents called the "Covenants, Conditions and Restrictions" indicated that exterior maintenance was primarily the responsibility of the mutual housing corporation and very similar to the cooperative housing documents. Without question, the exterior maintenance requirements salvaged the "shared concept" that most residents had come to believe in, including the elected officials at this point in time. The condominium housing corporation would also be responsible for providing landscaping services, exterior painting, janitorial services to laundry facilities, and roof repairs and replacements.

**Types and Levels of Services**

So the community was developed in stages. The maintenance challenge, simply put, was to develop a cost-effective service level to assure the community leadership and its residents preservation of all properties and to ensure property values and their appreciation with the overall economy. Of course, these service levels had to be developed in such a way so as not to cause the monthly assessments to become an economic burden to those residing in the community.

When every new mutual housing corporation was being formed, a budget was prepared for the interim board of directors to be submitted to the various government agencies for approval. California's Department of Real Estate was the major reviewer, along with Rossmoor Corporation, which as the developer, established itself as the interim board of directors. The developer's concerns usually were "what was going to be charged the new residents of the community and would the monthly assessment be reasonable so as not to jeopardize sales of the homes." The Department of Real Estate concerned itself with whether there were sufficient funds being set aside for future repairs and/or replacements of structural items that the housing corporation would be responsible for in years to come. As a result, much time was and is spent on determining levels of services which respond to the goals of the community to maintain and preserve the properties of all the corporations.

From a maintenance standpoint, the services were broken down
into two major categories: (1) Building Maintenance — to provide the ongoing daily maintenance by the following functions of appliance, electrical, carpentry, plumbing, and general maintenance services to the community; and (2) Preventive Maintenance — to provide interior and exterior painting and decking, janitorial services, streets and sidewalk repair, as well as interior maintenance services. In order to better understand the complexities, we will review services rendered in each of the functions and some of the challenges that have impacted our service levels.

**Building Maintenance**

**Appliance Services.** Responsible for inspecting, repairing, and replacing of the following appliances in the community: refrigerators, ranges, ovens, dishwashers, washing machines, and dryers. One of the common questions and challenges to our appliance group is “Why don’t we have a better selection?” Since day one we have purchased and installed General Electric appliances in the community. It has been the belief of management and the various boards of directors that to handle a diverse array of appliances from different manufacturers would substantially impact costs to the community.

Today the appliance repair personnel are trained extremely well with regard to the product lines of General Electric, which makes it possible to provide one to two-day response time for most service requests. If we stocked every possible appliance, as well as parts for repair, someone would have to bear the cost. The cooperative housing corporation is responsible for all appliances in the dwelling units and without question would bear the burden of cost for the ability to provide its constituency with a list of appliance options. Of course, if you live in a condominium in the community, you are free to choose the appliances you desire. The chances are that the appliance staff will not repair those appliances that are unfamiliar.

It should be stated at this point that management has been fortunate over the years to have an excellent staff in the appliance area who, through their preventive maintenance efforts, have extended the life of many an appliance. This, without question, has saved the cooperative housing corporation many dollars.

**Electrical Services.** Responsible for all lighting and electrical
systems within the community. The electricians service all interior electrical problems as well as failure of the various heating units. Included are such items as breaker boxes, walkway lights, electrical outlets, street lights, fans, breezeway and pool lights, blowers, wall heaters, plus more. This important function is accomplished with a one-day service response time.

The challenge of this group over the years has been the constant re-lamping of the community. The electrical group is responsible for over 3,000 walkway lights, over 6,000 carport lights, and some 27,000 building lights. Nothing seems to irritate a resident more than for lights to malfunction. From 1978 to the present, the community leadership has taken very seriously the energy crisis of the country by replacing, where feasible, the exterior lighting system with the more efficient fluorescent lights, which has saved the Leisure World community money on its electricity bills.

Carpentry Services. This service is responsible for practically anything that has to do with lumber, including repairs and replacement of sidings, pillars, posts, and balconies. Additionally, the carpentry staff handles window screens, sliding glass doors, roof-leak repairs, downspouts, re-keying of entry doors, and much more.

It is fair to say that with each year gone by, the carpentry section sees its work load increase. Simply put, most of its services are impacted by the age of the buildings. In the early years before the community implemented a roof replacement program, the carpentry staff spent countless hours trying to resolve roof-leak problems on flat roofs. They were not always successful in that, as usual, the rains of California would stop, the patch on the roof would be made, and no one would really know its success until a year or so later. So it became important to accelerate the roof replacement programs of the various housing corporations. Suffice to say, the reserves for roof replacement were insufficient, having anticipated a lifespan of fifteen to twenty years for roofs. However, since implementation of a roof replacement program during 1980-81, roof-leak problems have diminished substantially. Nevertheless, it will continue to be challenged by a severe dry-rot problem. Almost every building is involved. Present solutions are to prioritize those buildings with potential safety hazards, such as buildings with balconies and breezeways, and to establish the appropriate work crews to resolve the problems in the most expeditious fashion.
Carpentry has always been resolute in its effort to handle a wide range of maintenance problems. Perhaps its most difficult assignment ever was carport condensation. The drips on automobiles drove community residents crazy. We tried every product available and asked the developer to try different construction techniques. Finally, a corrugated fiberglass panel was made available to residents at their expense to catch the condensation.

Plumbing Services. The plumbing service is responsible for repair and replacement of all plumbing in the community as well as all water and service main lines not owned by the utility company. Multi-unit buildings and multi-story buildings, just by their nature, create plumbing problems. One can well imagine since day one the service requests from residents with regard to water pressure line problems and severe backups — a community whose residents travel, sometimes leaving water running which runs into three or four other units.

The situations and problems are varied and numerous. By definition, much of our plumbing work load is emergency oriented. The challenge in this work area has been to develop preventive maintenance measures which can reduce inconvenience. A good example began in the cooperative mutuals, where its leadership, working with its managing agent, decided to replace water heaters on a programmed basis rather than wait for the heaters to develop slow leaks or to simply burst. The cooperative had sufficient reserves to move forward on this plan, surely saving dollars in the long run by reducing personal property damage problems.

Today we see foundation water pipe leaks, broken pipes, and major sewage stoppage problems. Again, the cooperative buildings now have a major sewer and building drain line program in progress which will, hopefully, alleviate a stoppage from occurring. Our plumbing services usually have a one-day turn around, although some of the major programs today require the staff to be around longer when handling the underground repairs.

We have just described those programs and services that can result in a difficult day. What is described next are building maintenance services such as preventive maintenance, and are as follows: Janitorial, Painting, Streets and Sidewalks.

Janitorial Services. The preventive maintenance programs started
The 13-floor luxury apartment hotel-type condominium, “The Towers,” the only facility of its type within Leisure World, looms large overlooking the 3-par executive golf course (above), while in the picture below, Towers residents are seen enjoying afternoon tea in the club room, a quiet period of friendly conversation in addition to the three regular dining occasions in the two dining rooms.
The Leisure World Library is the outgrowth of devoted volunteers, chief among them Catherine Wright (above) whose ardent leadership of Panhellenic in 1965 resulted in its sponsorship of the Library in 1966 in Clubhouse 2. The all-volunteer staff served as it moved into its second home (below) the vacant “snack shop” in 1969, near the Administration Building.
Moving into its present “permanent” home in 1976 (above) the Library continued as an all-volunteer service to residents. Catherine Wright (below, left) retired in 1982 after 15 years as volunteer director and was succeeded by Irma Franklin (right) who continues as the volunteer director.
Early rising tennis players (above) watch riders silhouetted against the morning sky as they leave the stables to explore the Aliso Creek trail system. Later in the day they may be found in Clubhouse 4 participating in an art class (above, right), or at a pottery wheel (below, left), or operating an intricate metal-working or woodworking machine (below, right), or designing personal jewelry, sewing, or joining friends in a game in the bridge room.
The Aquadettes (above) are star performers in their annual August show at the Clubhouse 5 pool, swimming in intricate formations, each one a trained athlete at ages reported as “up to” 90, working out daily during much of the year to perfect their routines. The evening may find many of them at one of several dances (below) — formal, informal, “western,” or luau — sponsored by one of the clubs, by private groups, or by the community — open to all.
Long-time and dedicated starter at the 27-hole golf course, Ray Burton (above, left) as he appeared at his ever-present mike. Boys will be boys (right), even in Leisure World, at the 19th hole. The starter's house (below) and pro shop at the first tee, looking out over the more level area of the course.
naturally with the need for janitorial staff to maintain the various community facilities. Daily services to the clubhouses, pro shop, administration building, and maintenance center were required from the beginning in the community. Janitorial services have not been questioned much as to maintenance of community facilities, but as to services to the mutual housing corporations, that is a different story. For instance, should the approximately 450 laundry buildings be cleaned weekly, bi-weekly, or monthly? Over the years, we have had each of those service levels. Then came the arrival of three-story buildings and their stairwells, recreation rooms, underground garages, mail rooms, etc. How often should the janitorial staff clean these buildings? We considered both weekly service and daily service, but when directors saw the costs of janitorial services go up, the shared-expense concepts were soon in jeopardy; so much so that the early Garden Villa buildings were charged a surcharge for such services. Our janitorial services are important to the overall cleanliness of the community and level of services. Supervision and productivity will always be a factor in determining the final report card on this preventive maintenance function.

Painting Services. Since the very early years of the community, the mutual housing corporations have established a preventive maintenance reserve for exterior painting. The original scheduling for residential buildings was every four years for trim painting, and every eight years for both trim and stucco. During the mid 1970’s, with inflation spiraling, staff was asked to go to an “as needed” painting program. The concept was simple. The painting supervisors would inspect the various buildings and determine during budget preparation the number that had to be painted.

The “as needed” program lasted for approximately two years. Can you imagine what happened when a building was being painted and the adjacent building was not scheduled? The residents were upset. Although we deferred cost increases for reserve contributions, the program was a failure. As such, the exterior painting program was put back on a regular schedule of every five years for trim and every ten years for both trim and stucco.

Today, the exterior painting crews are responsible for over 2,500 buildings. Recent change in policy of both housing corporations to provide a standard color program is enhancing the appearance of the buildings. The most common complaint for many years in the
cooperative buildings, has been, "When are we going to get rid of the awful green-colored buildings?" Beginning in 1988, we are in the process of getting rid of the green. The modern colors selected should enhance everyone's property values.

**Streets and Sidewalks**

This preventive maintenance function has been responsible for the maintenance and repair of the community's concrete and asphalt installations. These include the streets, cul-de-sacs, parking lots, perimeter walls, and, of course, street sweeping. The goals and objectives of asphalt repair groups have been to extend life where possible. Despite the slurry seal program of the past, we have had a gradual failure of our cul-de-sacs. So combined with the sealing program, we are replacing those cul-de-sacs which have deteriorated beyond economical repair.

The street and sidewalk section has always done more than just worry about streets and sidewalks. All of the street signs, approximately fifteen hundred, stop signs and direction signs are repaired and replaced by this group. Aliso Creek, which runs through United Laguna Hills Mutual in Phase I, is the responsibility of the staff. The storms of 1980, along with heavy residential construction north of Leisure World provided a challenge at Aliso Creek. Quite frankly, during heavy rains, homes situated along the channel were left unprotected from flood waters. Golden Rain Foundation authorized funds to riprap the most dangerous areas and divert the channel to protect structural properties. Since that time we have been able to maintain Aliso Creek successfully and to assure safe exit of the water out of the community. Street and sidewalk crews have performed admirably in preventing problems before they occur. They repair sidewalks before folks slip and fall. The street-sweeping program in Leisure World is better than in any other city, and certainly the miles and miles of streets and cul-de-sacs have never looked better.

**Tangible Support Groups**

Any maintenance organization must have excellent support groups in order for the maintenance programs to be implemented and controlled in line with the community's business plans. Over the years three work functions at Leisure World have provided this support.
They are as follows:

1. Customer Services

2. Permits and Inspections

3. Vehicle Maintenance

**Customer Service Department**

The Customer Service department receives, organizes, and distributes all of the resident services requests. Today, this department handles some 90,000 calls a year from residents requesting service. In the early years, located in the Administration Building, this group at one time handled the developer's warranty calls. From day one, all service requests were maintained on a manor history card. This department has gone from a labor oriented manual system to a highly sophisticated computer system. One of the major challenges for this group is to prevent job stress and burnout. One can imagine the types of calls this work force receives. The demands are high and the residents expect immediate services which are often not available due to scheduling conflicts and the level of services. Certainly, time has proven that this staff eases the burden of the work force as a result of its efforts.

**Permits and Inspections**

Permits and Inspections is responsible for the administrative planning, design, and construction of major and minor projects in the community. Additionally, this group oversees all the resale inspection in the community and provides all the specifications for the building alteration programs, working closely with the community’s Architectural Control Committee. This highly productive staff has met one challenge after another. Imagine eight hundred to a thousand resales a year, half of which require interior inspection (cooperatives). Since the early years, this department has overviewed and been responsible for the construction of all the clubhouses built by the Golden Rain Foundation — such facilities as Clubhouses Three, Four and Five, the Library, the Mini Gym, and, of course, many others. All of the roof replacement contracts, street
replacement contracts, and cul-de-sac contracts are handled by the Permits and Inspections staff.

Vehicle Maintenance

Every morning when workers arrive, awaiting them is a fleet of vehicles and equipment ready to serve the community. After many years of working in an antiquated building, the Vehicle Maintenance staff now has a modern facility. This department today maintains over 150 autos and trucks, 127 Cushman scooters, 3 forklifts, 2 street sweepers, 18 buses, and an assortment of other machinery.

Major emphasis over the years has been to apply preventive maintenance practices so as to extend the useful life of each piece of equipment. Obviously, on a daily basis, the community cannot afford to have a major breakdown of equipment. Some of our major purchases come as a result of Vehicle Maintenance recommendations based on years of maintaining certain buses and autos. In the early years, for instance, a small minibus cost $15,000. Today, a new bus costs over $100,000. This department’s efforts provide assurance that our maintenance crews are more efficient and that our division heads get sound evaluation for future replacements.

Future Considerations for Maintenance

The maintenance requirements in Leisure World, Laguna Hills, will continue to be extensive in terms of the volume and diversity of work required to maintain the structural, mechanical, and aesthetic integrity of the homes, grounds, and community facilities.

Every maintenance program and plan should include sufficient staffing and equipment to provide the best maintenance at the lowest cost. Planning is very important, so that the logistics of the programs flow smoothly. Often new technology permits the utilization of equipment that reduces manpower, is safer, and is more productive. Our painting program, for example, has reduced costs by employing manlifts and electrostatic spray guns. We utilize high-pressure water blasters for faster paint removal on carports and wooden surfaces. The Carpentry Department uses nailing guns for faster, more efficient plywood nailing.

The new maintenance facility will improve efficiency, whereby traffic, work flow, and movement and storage of materials and
equipment in general is much improved. The overall maintenance of trucks, buses, trailers, Cushmans, and other construction equipment is better, and costs for this type of maintenance have decreased and will continue to decrease in the future.

The future will require staff to examine areas where modern equipment can replace manual labor. The maintenance staff will require more training in an effort to keep up with advancing technology — particularly in the area of our mechanized equipment. In order to prepare and plan properly for future maintenance in Leisure World, it is necessary to be knowledgeable about the present and past programs, problems, and conditions. A community that is twenty-five years old has naturally experienced a history of complex maintenance needs.

Understanding the physical condition of the buildings and grounds is important to future maintenance programs. First, and probably most significant, is the fact that the buildings themselves are as much as twenty-five years old. Many of the buildings are experiencing dry rot, which requires immediate and costly repair. Currently, the stucco and wood exteriors are in excellent condition except where dry rot has occurred on some of the decks and breezeways. Over the course of time, there has been some cracking and shifting of building slabs, but nothing major. Concrete and asphalt driveways and streets are generally in good shape, but are being repaired and replaced prior to major failure. The areas of plumbing, electrical, and mechanical are the areas that show the impact of the twenty-five years of age most vividly. They are suffering from age and obsolescence.

Original building and facilities construction must be considered. Wood requires more frequent repair, replacement, and painting than stucco does. Wrought iron gates, fences, light fixtures, etc., are very high in maintenance costs. Flat roofs have a much higher incidence of leaks than sloped roofs, although roof construction, percentage of drainage, type of plywood, flashing, gutters, and downspouts all contrive, along with the slope and pitch of the roof, to influence effective maintenance. Economy dictated a minimum structural asphaltic pavement. Types of drainage of streets and cul-de-sacs with surface drainage affects street maintenance. Certain pipes, both cast iron and galvanized supply lines, are now outdated and in need of replacement. Based on an understanding of the foregoing, planning for future maintenance should be attainable.

The present condition of the buildings and related site work in
Leisure World gives us many clues. Our past and present maintenance programs have been generally quite effective in preserving the Leisure World properties. The painting program on its five and ten-year cycle, with the annual roof repair and replacement, annual deck maintenance, and resurfacing keep the community values up. Also, appliances are changed regularly, depending on the useful life. The drains are cleaned on a schedule and the co-ops have regular interior preventive maintenance. These and the continued daily response to routine and emergency needs constitute the ongoing maintenance challenge.

These are just a few of the many maintenance programs, both general and preventive, that have been very effective in preserving and extending the life of Leisure World buildings. We must continually remind ourselves of the basic design and construction technology employed during the construction of all buildings, site work, and paving. Maintenance problems which continually challenge Leisure World are in many cases the direct result of the basic construction and/or design. We have discovered roofs that have failed prematurely because of poor drainage and construction flaws. The enormous amount of wrought iron gates, rails, fences, light fixtures, and other decorative items has required many hours of additional painting, welding, and repair. A bare bones approach to the cul-de-sac paving and drainage design has led to premature asphalt and concrete failure.

Again, these are a few of the maintenance headaches that were inherited. We are well aware that the developer provided buildings and site work that were architecturally beautiful, but cost considerations often resulted in certain areas receiving minimum detailed attention. We are required on a daily basis to respond to badly needed repairs and modifications in those areas. Fortunately, we have had the technical and manpower resources to respond to these needs in a timely manner. As was stated earlier, future considerations for Leisure World maintenance depend on our awareness of past and present conditions.

As Leisure World approaches twenty-five years of age, consideration must be given to advance planning more than ever to keep these facilities in the present excellent condition for another twenty-five years. One of the most important programs is that of programmed painting and deck resurfacing. The present five-year trim and ten-year stucco painting must be maintained. We should very closely examine wood and stucco structures prior to painting and deck resurfacing, and do the necessary repair and replacement before painting or deck resurfacing. We should continue to rebuild all Garden Villa
deck structures to non-carpeted wood structures with proper drainage. This will ultimately extend the life and reduce future maintenance costs. We currently are proceeding with these repairs on the 52 three-story Garden Villa type buildings.

United Laguna Hills Mutual has 1,124 buildings and 6.7 million square feet of roofing. Third Laguna Hills Mutual has 1,350 buildings and 7.4 million square feet of roofing. During 1988-1995 approximately 10 million square feet of roofing will be replaced. Roof replacement should include a basic 20-year life design for all flat roofs, to include the necessary sheathing and flashing repair. The important points here are to be able to budget sufficient dollars annually to keep ahead of the roof failure rate. This presently is approximately $1.75 million annually. New roof construction and design should also improve greatly on the original design and construction. We should continue to examine the roofing industry for new and improved technology in this area, particularly since we will begin replacing wood shakes and shingles at a greater rate in the future.

The asphalt and paving programs will need to be accelerated, due to the gradual failure of the cul-de-sacs. Currently, we anticipate spending $500,000 in United Mutual for this program. This should continue for the next five years or more and be expanded into Third Mutual. We have sufficiently provided for major renovation of Golden Rain Foundation streets and are continuing that program on an annual basis. Our redesigned asphaltic pavement section should be a substantial improvement over the original. We must continue with our in-house annual asphalt repair and sealing programs to prolong the life of the existing streets and cul-de-sacs. We will examine the expansion of the in-house preventive maintenance to include more crack sealing, leveling courses, and repair.

Interior maintenance programs in United Mutual will require major work in the near future. Appliances, stoves, ovens, counter tops, dishwashers, garbage disposals, and other major items must be programmed for replacement at the end of their useful life. This is critical. With the community twenty-five years old, many have already been replaced. However, a new five-year replacement program should be looked at to avoid a major future crisis. Demands for upgrades and replacement of counter tops, sinks, basins, and vinyl floors are increasing. These replacements must be accelerated.

Plumbing, electrical, and mechanical systems will soon require an overhaul. The mechanical systems in the community facilities are now and will continue to be programmed for replacement through our Five-Year Capital Improvements Proposals. United Mutual will
be required to undergo major plumbing revisions due to the deterioration of the old cast iron drain lines. These should ultimately be replaced with modern plastic, long-lasting, low maintenance drain lines. This situation is not critical yet and is currently being monitored through our daily operations, but in the near future, five years down the road, we will be performing major replacement of the lines.

The original electrical radiant heat systems will become obsolete and will need replacing, probably with a form of heat pump or other modern electrical heating system. The cost of installing a central gas heating system with all new ducting is prohibitive.

Concrete slabs and foundations in many buildings begin to show evidence of some shifting or cracking. We have had some experience in that area now and have been successful with modest repairs. Water seepage, expansion, and contraction are detrimental to foundations and slabs. We need to minimize and eliminate water intrusions whenever possible and keep ahead of the concrete repair work. We do not foresee this as a major problem, because most foundation problems, cracking, heaving, and separating, would have occurred by now. Where problems will occur is in those areas where underground leaks and flooding have undermined existing conditions.

The landscaping in Leisure World is well maintained. This will continue into the future, with new landscape and irrigation design to reduce water consumption and maintenance, and still maintain the beauty of the community. Our present irrigation system is outdated and failing. Our present schedule of valve and irrigation replacement should be accelerated. The sprinkler heads should all be adjusted for maximum coverage and minimum waste. Future irrigation and landscape replacements will take into consideration drought-resistant plants and shrubs. These can be phased in over several years. A major one-time change-out would be too costly. This community has 76.5 acres of landscaping, including 50,000 trees, 710,000 shrubs, 250,000 sprinkler heads, and 900 irrigation clocks.

The future of Leisure World's maintenance needs will include all of the above and many more. We have touched on severals of those that are considered important. In summary, it is important to be aware of those maintenance needs that require longer range planning and are very costly. It is necessary that when major replacements occur, such as streets, roofs, or irrigation systems, that the new system is an improvement over the old one. We have learned much from the twenty-five years of experience and are ready to apply this knowledge in our future programs.
"How much do we pay Mr. Lortscher?" I asked, "to be president of our Mutual." By a coincidence the Mutual was meeting on my first full day of living in Leisure World. A neighbor invited me to accompany him and meet his friends. Being alone at such a turning point — having lost my wife eleven months earlier — the invitation was gladly accepted.

"Are you kidding," answered this retired judge, "We pay him nothing. Members of Boards are all volunteers."

My condominium had been purchased on only my third trip to Leisure World. During escrow the furniture from my former home was stored for the thirty days it took for me to make a trip to Europe.

Early Impressions

At this meeting — my first exposure to self-government at work — members were really expressing themselves. All but three of the major problems seemed to have been solved. Minor ones, however, aggravated some owners. Nonetheless, Mr. Lortscher and the other Board members and committee heads were finally complimented on the things accomplished during these first three years of the Mutual's existence. The news, however, that they were doing all of this as volunteers dismayed me.

After the rather long meeting adjourned the two of us went to lunch. Fortunately for me, my friend was in a talkative mood. "This is the third Mutual," he began, "that I have lived in during the first fourteen years of Leisure World's existence. You have missed a lot of fun by not being here in formative years.

"While we have generally supported the actions of our governing Boards, we have always kept an eye on them. Occasionally this has brought about important changes."
"Will you give me an example?"

"Yes. About nine years ago a belief developed that directors of Golden Rain were holding back important information from the manor owners. They wanted to know what occurred before decisions were made by the Board.

"There was a need for better communications. A newly elected president of the Board (I can't recall his name) responded to those who felt that way by holding the first open meeting of the Board. He put the members of the Board on a stage to answer questions previously submitted in writing. It turned out to be a big affair. A crowd of over 3,000 listened to the questions and answers.

Means of Communication

"You will find that Leisure Worlders express themselves in many ways other than keeping an eye on their Boards. They engage in "administrative chats" on our Television Channel Six about subjects not necessarily connected with Boards.

"Also they write to the editor of the Leisure World News hoping that their observations on world events and their "thank you" letters, their suggestions, complaints and proposals will be published on the Letters to the Editor pages.

"Wait until you go to your first public lecture. Often, the lecturer finds that he is facing a serious group during the question and answer period." My friend continued to answer my original question with a short speech to me, an audience of one newcomer.

"The people living here in this self-governing community have made this a dynamic place to live in. Also, for some things it has done for outsiders it is well thought of by those living in other parts of Orange and Los Angeles Counties."

"Let there be no doubt of it," he continued, "by asserting themselves as they have, these individuals and groups must be given credit for making this outfit a whopping success."

In less than a year I would get married and move into my wife's home in an even newer Mutual. All of our neighbors were newly retired and living in Leisure World for the first time. They were an alert, energetic and curious group. Many had lost a spouse within the last few years.

The backgrounds of most of the men and women indicated clearly their potential for governmental positions in Leisure World. A former
construction engineer in the group became a director in the new Mutual. Nothing except the state of their health could keep them from desiring to take an active part in the management of clubs — particularly those groups having a philanthropic purpose — and attending with enthusiasm the classes and lectures that mean so much to those living in Leisure World.

Turning away from my street, we watched Leisure Worlders speak up and speak out in order to influence others. They recommended that new facilities be built. They proposed that continuous assistance of a particular kind be provided for the blind in Orange and Los Angeles Counties. In another instance, interested persons were urged to use a philanthropic club for an eight to ten year period to help raise funds for a new cultural center. Without question we were living in a dynamic community.

Also we enjoyed television programs and Leisure World News’ letters to the editor pages in which hundreds expressed themselves each year.

Popular Involvement

Other facilities presented themselves through which Leisure Worlders could express themselves. A large number of examples are shown on the following pages. They illustrate both the use of these channels and the wide variety of techniques the resident uses in employing them.

Readers living outside Leisure World, and others, may have little or no knowledge as to the way residents speak or write to their Boards. The following examples — surely a potpourri of topics that defy classification — illustrate how they have tried to influence the Boards as they spoke out: to implore them to retain the gate which shortened their walk to church; admonish them on the need for earthquake insurance and to caution them as to their liability if they refused to carry insurance against such damage.

Residents living in structures without elevators opposed a proposal to share the elevator expenses with those living in the larger buildings with elevators. Other residents expressed opposition to certain features of the new shuffleboard installation.

When the new busses arrived and were put into operation, a storm of protest developed about the design, their comfort and convenience. They complained that the users were not consulted before
the decision was made to buy the busses.

It was advocated by some that the Boards should consider doing away with the concept of shared costs of all recreation facilities. Others, wishing to retain this concept, argued that the sharing of costs had been an important consideration when they made their decision to come to Leisure World.

Residents are now, for the most part, speaking out to get the Boards to do everything they can to hold back such developments as the making Moulton Parkway a sort of expressway which will require an overpass where it intersects El Toro Road. In addition most residents seem to be opposing the development of a business and commercial park in that general area.

On other matters of extreme importance the residents are divided. These, discussed in detail at another place, are those proposals regarding incorporating as a city. Annexing possibilities and the future of Leisure World as an entity in the formation of a city or several cities are causes for concern.

Making their feelings known to the governing Boards is, no doubt, the most important way that Leisure Worlders speak out to influence other individuals or other institutions.

Use of Media

There are, however, many other important recipients and a variety of media through which Leisure Worlders make their presence known. One of these — fortunately for this community — is Television Channel Six.

From the time in early 1967 when Mr. Robert Price started his Administrative Chats, residents have sent between fifteen and twenty thousand questions to the various individuals who have continued with that particular program.

Residents use this channel to speak up or speak out in one or more of the following.

As noted, the "Administrative Chats" program has been used since early in 1967. In addition they use other programs that invite or permit questions to be called in by telephone. (Often this includes the live programs of the Boards).

Obviously, a person speaks out when being interviewed on regular weekly programs. The same is true for those who act as coordinators or speakers in programs such as the "People to People" program.
and the "Concerned Citizens for Peace" and others.

In another instance, Leisure Worlders speak out by sharing when they conduct the "Creative Writer's Workshop" each week. Moreover, those residents in the Parapsychology Club conduct their weekly program, as is the case in many others, to advance a particular point of view.

As we know, many hundreds speak, at least to a certain extent, through the "Democratic Forum" and the "Republican Report".

Under the heading of "Reports of Meetings," Mr. Al Hanson, while president of Third Mutual, became the first to appear on the Morning News program on the day following the meeting of a Mutual to report on what was discussed.

The Leisure World News provides a number of avenues through which the residents speak out by writing a letter to be published in the "Letters to the Editor" section. Of the four or five hundred published each year, only a small percentage are intended to attract the attention of the Boards or the Board's management agency, Professional Community Management Corporation.

Instead, many of these letters are written to thank certain individuals and to compliment others for superior performances.

Means of Expression

In addition to the "Letters to the Editor", the News offers "Straight Talk". In this segment a question is asked by a resident. The writer is often quite assertive. "Straight Talk" has been used to advantage on occasion to influence the offender in neighborhood conflicts. A few examples follow.

What are the rules and regulations for walking a dog on a leash? Should the dog be allowed to jump on pedestrians without the owner restraining or control-ling it?

According to Tim Taylor, community information manager, the Leisure World pet regulations are the same as those imposed by Orange County. According to Section 4.01 of the County Animal Permit Rules and Regulations, pet owners are required to prevent their pets from becoming or causing a hazard or nuisance to the health, safety or peace of the community.
A reasonable interpretation of this ordinance would seem to prohibit dog owners from allowing their pets to jump on people.

At the Third Laguna Hills Mutual meeting on Sept. 20, during a discussion about security and the wall around Gate 14, a woman stated “They are coming over the wall”. How many reports have there been during the last year of intruders coming over the walls in this area?

According to Dan Woodward, security director, security has not recorded a single incident regarding intruders coming over the wall in the Gate 14 area in the last year.

What are the regulations regarding resident and non-resident parking in guest parking areas? Is there any time limit for cars parked in the same spot?

According to Dan Woodward, security director, non residents may park passenger vehicles on a temporary basis in the guest parking areas. Residents may not park in the guest parking areas in Third Laguna Hills Mutual as stated in Article III, Section 10 of the revised CC&R’s. Although there is no formal policy in United Mutual, resident parking in guest spaces is discouraged.

There is no time limit established for parking, however, a vehicle may not be abandoned anywhere inside Leisure World without being subject to impounding.

Recently, letters have been published on the following and many other topics in the “Letters to the Editor” pages. One makes a statement and an analysis of Proposition 13 to answer a complaint by another Leisure Worlder. Another comments sympathetically on the Japanese-American camps in the United States during World War II; a resident answers
The People Speak

a letter, written about the SDI, which made unwarranted statements about its use as an offensive weapon: a second resident comments on the appearance and attitude of a Vice Presidential candidate.

Again, it is asked whether, in opposition to the voters of Leisure World, could it be annexed by another city; a World War II veteran criticizing a committee for awarding a candidate World War II veteran status. Another letter reassures Leisure Worlders about the very low level of Radon gas in this community.

Service crews are complimented on making quick repairs on certain streets and, again, the Landscape Department is complimented on the way it cleaned up certain lawns.

A lady implores another lady to return a manuscript about travel that had been turned over to the lady without getting her name. This is followed by two letters giving the writer’s views on euthanasia.

Congressman Robert E. Badham defends his vote against catastrophic insurance because that particular bill was too expensive. This is followed by a criticism of our policy in the Persian Gulf, while another resident requests information on the adding of ESPN in order to show pro-football games that are not now available because they are scrambled.

Another letter compliments the Recreation Director on the fine shape of the tennis courts; several letters criticize the same director for her decision as to where visiting children will be permitted to swim, and a request that more time than certain present electric signals permit, be allowed, in order to cross some of the streets.

The letters continue. They request that traffic lights be synchronized; they criticize facilities for the handicapped in restrooms; and they comment on bus schedules.

It is asked whether Leisure World can be forced to incorporate. A new name is suggested for Leisure World and a delightful bit of whimsy appears in a six paragraph well-prepared letter sharing with us the experiences they had when humming birds came into their home.

The Leisure World News, says one recent letter, should be awarded a gold plaque for its distinguished service to the community, and for giving us the luxury and availability of a “sounding board”.

In the same letter, the writer bitterly criticizes public officials and politicians outside Leisure World, for permitting a shopping center to be constructed at the already over-crowded corner of El Toro Road and Avenue de la Carlota.
Officials responsible for the recent Annual Super Seniors Tennis Tournament thank those of Leisure World, particularly those who furnished free housing and transportation.

The new owner of a manor thanks the Grounds Maintenance Committee for its part in quickly resolving a landscape problem.

Insofar as “Letters to the Editor” pages devote space to “thank you” letters it is providing an unusual channel for this kind of expression.

Another resident speaks out by saying that members of the media are unethical, mean-spirited, cruel, vicious, cynical, biased and prejudiced (and a lot more).

Forums and Discussion

Turning to another medium, in Leisure World the question and answer period following almost every lecture provides an excellent opportunity for residents in the audience to speak out. Often (too often) the questioner indulges himself or herself by making a short speech.

Lively discussions took place in the following and many other such periods during the last few years.

Last year five hundred or more heard the open lecture sponsored by the Academians. It was given by Professor John S. Galbraith, former Chancellor of the University of California, San Diego. His subject was “Reflections on South Africa and Apartheid.”

Professor Galbraith has had a distinguished career at the University as a Professor of British Empire History. Later, he served as Smuts Professor of History at Cambridge University in England.

When he completed his presentation at Clubhouse III, including his conclusions on Apartheid, he offered to answer questions. Immediately a line of eight or ten residents lined up at each of the two microphones. Even though he was a world authority, many spoke out against Professor Galbraith’s conclusions, knowing that he had spent years in Africa doing research on this very subject.

Some of the men — well above military age — seemed to suggest that some sort of drastic action should be taken by the President.

These discussions, of course, were completely appropriate. Galbraith, an experienced speaker, made it clear that he was very happy to have the statements and points of view, some of which came from residents who were specialists in that field. Not only was
the original presentation a splendid one, but the additional twenty-five minutes of discussions enhanced the performance.

Another lively exchange took place in an open lecture sponsored by the Leisure World Historical Society. In this case the presentation was made by a professor from the University of Southern California. The subject of his lecture was "How concerned should we be with Fidel Castro's activities?"

At the time, Castro was urging all of our South American debtors and Mexico to default as a group on the billions of dollars owed to United States banks.

After building up a splendid case for it, the professor stated his conclusion that Castro was so busy — and would continue to be — trying to solve his extremely difficult problems that he would not give us any trouble. Thus, we should not spend any time worrying about him.

Again, as in the previous instance and in the same room, lines formed at each of the two microphones. They asked the two questions that we knew — and the speaker knew — they would ask. They were, "Why not cut him down now, as we surely should have done with Hitler in 1931 and 1935?" and, "Under such pressures as you describe, doesn't history show that such a leader is likely to trump up a cause and start a war to get him out of his difficulties?"

As noted, the speaker had anticipated these, and many more questions. He fielded these and many others much to the satisfaction of the audience.

Not only do these spirited discussions add a new dimension to the evening's entertainment, they seem to give the questioner a certain release from tension (which may have been building up for a long time). The very act of speaking up before an interested audience and getting an expert in the field to provide an answer in a congenial sort of manner, must give a great deal of satisfaction to the resident.

Another splendid opportunity to speak out is provided by the series of lectures on the "Frontiers of Knowledge" given by faculty members of the University of California, Irvine. This series, sponsored by the Foreign Policy Association, is attended by four or five hundred residents.

Each program is dedicated to recent advances in research. They are stimulating lectures. However, some attracted more questions than others.
“High Earthquake Risk Buildings: Engineering and Economic Aspects” drew almost too many questioners. On the other hand “New Visions of the Brain”, by Professor Joseph Wu left the audience too subdued to ask the usual number. The same was true in the case of “What’s All This Fuss About Superconductivity?”

Later, the house was filled by Professor Ludwig’s “Current Research in the Scientific Exploration of Aging”, and a curious group of residents could have stayed a half-hour longer to “say its piece”. Undoubtedly, scores of Leisure Worlders will speak out after Professor Sarah Mosko’s lecture — the tenth of the season — on “Sleep Disorders”.

Clubs Provide Opportunities

Turning to another closely related channel, invited guests and members of clubs follow the same practice as noted above. In the case of a club the one in the audience who speaks out addresses a smaller audience and is likely to be a part of the same audience each month. In four of the six clubs we have belonged to for eleven years, speakers were scheduled for about eighty-five percent of the meetings. We can not recall a time when many individuals did not take the opportunity to express themselves.

Speaking out in a somewhat different manner follows.

In one of the clubs, which will have its 100th meeting early in 1989, another channel for expression was provided. Twenty-seven of its own members were speakers or performers at approximately eighty-five percent of these meetings. Most of these had given talks inside and outside of Leisure World.


These twenty-seven men and women also spoke about conditions in the field of Medicine, Geology, Agriculture, Physics, Remedial Speech, Engineering, History, Religion, Management, Radiopharmacy, Genetics and many others.

As performers, they (and all guest speakers) made a significant contribution to the cultural life of hundreds of Leisure World residents.
Turning to a different medium, discussion groups with a leader abound in Leisure World, with some such groups being tied in with Emeriti Institute classes. There is one especially interesting case of the use of this kind of forum. It is one in which Leisure Worlders feel they may be making their presence felt. This occurs in the series of discussion groups offered each year by the Foreign Policy Association of Leisure World.

Eight groups of from ten to twenty individuals meet under the auspices of the National Foreign Policy Association using the materials provided in the Association’s booklet entitled the “Great Decisions of the Year.”

This booklet contains reading materials on the eight important policy decisions facing the United States for that particular year. At the end of the series of eight meetings the members of each group fill out a questionnaire giving answers to questions regarding each of the subjects.

Not only have members expressed themselves to a local group, but they have the feeling that they will have influenced — possibly only slightly — the country’s foreign policy.

Reaching Out — Cultural Impacts

It was a happy day in July, 1967 when Club-President Catherine Wright and the sixteen members of Panhellenic Society decided to speak out for a Leisure World Library. Nine years later, after operating in three temporary locations, they celebrated the opening of the present new building. This activity is described in detail elsewhere.

A great day for the blind individuals in Los Angeles and Orange Counties occurred in 1976. Two Leisure World women — both qualified transcribers — proposed that others qualify and join them in starting the Transcribers Club of Leisure World. This club would transcribe the text of articles and books into what would be master copies for the printing of books for the Braille Institute Library. The club, established that year, grew to more than thirty members.

Later, in a recent year, the members transcribed 22,488 pages of text into Braille. Thus, many additional books became available to blind individuals served by the Institute’s library.

Many members of the community speak through “Common Cause” of Leisure World, a chapter of the national organization which was founded in 1970. Among other things, Common Cause
Club is critical of government officials who receive excessive contributions from Political Action Committees. Criticism is also aimed at the lack of responsiveness and accountability of government officials to the public’s wishes.

At both levels, “Common Cause” speaks out for the great need to improve the ethics of public officials.

A significant movement—to build a performing arts center in Orange County — started in the late 1970’s and continued throughout the 1980’s. This cultural center was expected to cost between $60,000,000 and $70,000,000. More than a dozen devices were adopted to raise this sum. One of these was to organize chapters—named after musicians—of musically oriented persons.

A determined group accepted the responsibilities of one of the chapters. It became Leisure World’s Beethoven Chapter of the Orange County Performing Arts Center. In this capacity during the last twelve years it has publicized the project through the chapter’s musical programs and its annual concert and other money-raising activities.

Although many other Leisure World organizations should be named, it is possible to select only a few additional clubs to illustrate the variety of ways the founders asserted themselves.

The Opera 100 Club, organized in 1967, is a philanthropical group dedicated to the dual purpose of supporting young performers who intend to have an operatic career and to provide programs for residents. Almost one thousand contributing members attend six operatic performances each year. One of these is given by audition winners under the direction of a professional director. The members of Leisure World who asserted themselves and made this project possible, have also left a significant impression on both the community and the recipients of its scholarships.

The Associates of Saddleback Hospital, founded in 1971, is another philanthropic group. The Associates serve as a source of private annual support for the not-for-profit hospital. The group has used the several millions of dollars it has received in contributions to purchase equipment and other capital needs for Saddleback Community Hospital.

Early residents insisted that a start should be made to keep an orderly record of the origin and development of Leisure World. Beginning with Margery Jones’ book on Leisure World and its Development During the Period 1964 - 1974, the Leisure World Historical Records
Committee came into being. This was changed to the Leisure World Historical Society and incorporated in November 1977.

This Society spoke out initially, and has continued to speak out, for the need of collecting, preserving and owning all of the materials pertaining to the history of Leisure World. In 1979 the Society opened an office in the Administration building to facilitate this task.

By speaking out and declaring themselves early in the life of the community, materials and oral histories have been collected and preserved which otherwise might have been permanently lost.

Community Organizes

Leisure Worlders who live in approximately two thousand of the more than twelve thousand manors have joined the Community Association for Residents of Leisure World. Apparently this has been done to apply group pressure, on occasion, for or against certain actions of the Boards and Professional Community Management.

The Managing Editor of Leisure World News, Mrs. Myra Neben, is among others a researcher in the origin and development of this association. Citizens living in self-governing enterprises, Mrs. Neben points out, always feel that they have the right to “question their officials and their governing policies”, and that from the moment this community started “its citizenry took advantage of this right.” She continues:

The relatively peaceful community of Leisure World has seen democracy in transition. It has evolved, in fact, from a community run by its developer, and developer-chosen management, to one more controlled by the people who live there to whom management is accountable.

The first group to raise questions was called Factfinders. It was chiefly concerned about the financial stability of Leisure World. Its members pressed for the answer to many other questions and asked for various financial reports. In 1968 a meeting was held in which they received relatively complete answers to their questions.
According to Mrs. Neben:

The Factfinder’s era eventually ended but it was not the end of the desire of the residents to question. The Community Association for Residents of Leisure World, which is still going strong today, began in May 1976. It began as a small study group . . . . In the same year a turning point occurred for both the Association and community governance with the advent of the Arthur D. Little Report.

This consulting firm had been hired to evaluate the functions of Professional Community Management within Leisure World and to make recommendations. As has been noted in previous chapters this report recommended a change in the management structure of Leisure World. Again, Mrs. Neben continues:

In the early and mid 1970’s the “democracy” of Leisure World was still evolving. Board meetings were still closed to the press. Members of Leisure World could attend, but they were not especially welcome. Much of the meetings were in closed session. News about the meetings was obtained following the meeting, when a reporter would meet in the general manager’s office with the president of the board and another board member, and would be told what action had been take. There were no reports of opposing views to board actions by individual members.

The Community Association began to hold candidate forums. This was a new procedure for Leisure World candidates for the mutual boards, who were still nominated by committees.

The “Meet the Candidate” program was a success . . . . It was only a few years before the boards themselves took over the function. The Community Association, over the years, has not let up on its quest for information.

It now holds budget forums, it invites Professional Community Management staff, mutual board and Golden Rain Foundation members to address the group. Information is more forthcoming, more open.
The Community Association also became involved in proposed projects. It raised serious questions about a suggested outdoor recreation center that many members felt far exceeded the needs of the community. They polled the entire community with a response from over 8000 manors opposing the project. They sent bus loads of people to the planning commission hearings to oppose the zoning. It was dropped. Also, they raised questions about the cost of the new maintenance center. It went back to the drawing boards and was scaled down.

Boards and management became more responsive, however, as board and committee meetings became more open.

There are still areas of disagreement within the community, but differences of opinion are what make a democratic society. Leisure World people are free to disagree with management and board decisions, and they do.

Expansion of Community Relations

Turning from Myra Neben’s comments about the Association to another club where it is interesting to note that an exchange of ideas usually occurs in a congenial atmosphere, such exchanges take place at the President’s Council. (At least it was congenial during the eight consecutive meetings I attended). At that time, Presidents of the 188 clubs that are officially organized and recognized in Leisure World meet with a department director of Professional Community Management. Although there is always a planned program, it is designed to allow time for the discussion of one or more topics. Some of the founders of organizations were still acting as presidents at that time. Scores of the presidents were well-known to each other.

In a congenial way, presidents spoke out about budgets, space for meetings and in one case against the denial of the right to sell an author-speaker’s autographed books at the room used for his lecture.

Closely related to the clubs — and occasionally combined with — are the large number of Emeriti Institute classes described in detail in another part of this study. In certain of these classes — Political Science, Economics, History and others — part of every
meeting is devoted to discussions (rather than lectures) in which Leisure World residents assert themselves.

A small group, not organized as a club, is also asserting itself by doing something significant for those in the county (outside of Leisure World) who have been classified as functionally illiterate. These prospective tutors have qualified professionally by earning themselves certificates to tutor those who are so deficient in reading, and of course mathematics, that they are unable to read street signs and numbers on residences.

Any description of the manner of speaking out in Leisure World would be incomplete without mentioning Jane Kemna’s crusade for placing lifts for wheelchairs in a certain number of dial-a-ride busses.

Furthermore, a note must be made recognizing all others who proposed or formed any Leisure World organization. Taking the initiative for such a project always means doing a substantial amount of organizational work for a year or two. Undoubtedly, those who founded an ongoing group have made an important contribution to the life of the community.

Included in the foregoing pages are incidents and episodes which reveal many of the topics on which residents have chosen to speak out. Also included are descriptions of the channels they use to communicate their thoughts and desires.

A Way of Life in Leisure World

Leisure World residents speak out almost continuously on scores of topics. They are doing this, on the one hand, to impress members of Boards, County Supervisors and other public officials and performers and (to thank) friends and neighbors. On the other hand they often write the editor of the *News* in order, among other things, to share a delightful experience — the new residents and the little family of humming birds — with the other readers of the paper.

As to the intensity with which they speak out, we have encountered residents who spoke out quietly and entertainingly as in the case of the humming birds, through all of the stages of civility to that of outright — although not too impolite — heckling.

This self-governing retirement community — with its screened population — has attracted thousands of resourceful, energetic and alert individuals and couples. Members of this population fully expect to be free to speak at any time on any subject of their choice. If
Fun in Leisure World — epitomized by its own Theatre Guild (above) shown in a 1975 performance of "You Can't Take It With You." Five performances of each of three plays a year keep the company busy in rehearsals. Few retirement communities can boast a riding stable (below) as does Leisure World. Some residents lease a stall for their own horse, while other avid riders rent a mount to ride out on the open trail that joins the system of county riding trails.
as they see it, the appropriate medium is not available, they form an organization — as in the case of the Community Association — to fit their needs.

Meanwhile, in the last ten or more years, additional channels have been made available through which residents may speak out. With one important exception, residents are using these media more now than in earlier days. The exception — fewer residents now attend the important meetings. (Some reasons for this: much less to criticize, the grumblers have disappeared, the average age of residents has increased each year, things have finally gotten into place, better trained PCM employees and the fact that many of these meetings are taped for a later showing.)

As to facilities, Leisure World residents have continued to use them to the fullest extent. More letters than can be published are sent to the News, lecturers are asked to answer “just one more question” and discussion leaders have difficulty bringing the meeting to a close. To this should be added the personal appearances and the petitions placed before the Boards.

It may be safe to say that this community is unique in the sense that it has spoken out effectively through the many channels available to it.

As we have noted, during my first full day in Leisure World my friend said that asserting themselves as they had, individuals and groups had made this community a success. He was speaking for the first fourteen years of Leisure World’s existence. We would have to agree that speaking out during the last eleven years has gone a long way toward making Leisure World the place it is today.

In this splendid environment, residents are free to speak out at all times. And that is exactly what we expect them to do.
Laboratory for Gerontology Research

Up to this point in our history we have dealt almost entirely with Leisure World as a going organization, starting with its beginnings and going on through its twenty-five years of life. But Leisure World is a part of a larger world retirement community. It is appropriate therefore in this tenth chapter to look more at the broader retirement scene. Then in the final chapter we will come back to Leisure World and look ahead to its future. In the present chapter we will first take the historical perspective and look at the history of aging. When did the problem of aging first get attention, and how has the study of it developed over the years? Then we will take note of some of the more recent research about aging. This will enable us better to approach the final chapter, when we will try to look ahead as Leisure World faces the years beyond its first quarter century.

Early Thoughts About Aging—

Benjamin Franklin took time in his busy life to give some serious thought to the riddles of aging. Franklin was a politician, statesman, scientist and moreover a thoughtful individual. His thinking about aging reflects the expansive optimism of American views in the 18th century. One of his regrets was that he had been born too soon to see the dramatic advances that he felt were in store for science and for the benefits that the application of scientific discovery had for lengthening human life. He believed, as did other educated people of this period, that life might be suspended for a period and revived

later. In particular, Franklin was aware of the fact that in death, bodies are cold. It is but a step to think that we might be revived by the addition of heat or some spark as might be provided by lightning or static electricity. Franklin belonged to the prescientific era of speculation about human aging. It wasn’t until the 19th century that we began to see the beginnings of experimental science that permitted the testing of ideas that thoughtful persons raise about the fundamental nature of aging.

Gerald Gruman (1966) wrote an interesting history of ideas about the issues of life and death and the prospects of living longer. He discussed the evolution of ideas about aging from antiquity to the prescientific era, i.e., up to 1800. Apparently as long as man has had the capacity to reflect and communicate to others, he has speculated on the issues of why living things seem to age and increase their probability of dying with the passage of time. Gruman points out that the first writing concerned with the issue of human mortality is in the epic of Gilgamesh. The clay tablets which contain the epic poem date about 650 B.C. In the poem, Gilgamesh, the hero, is concerned with obtaining immortality and he seeks advice from a sage. He is told to obtain a thorny plant from the sea bottom, the eating of which would impart longevity. Unfortunately, Gilgamesh refreshes himself by bathing after securing the plant. A serpent comes along and eats the plant Gilgamesh struggled to find which gives snakes the capacity for renewing their skins and presumably their potential for long life.

In the flow of thought in Judaism and Christianity, the story of Adam and Eve would suggest that Adam and Eve would have lived forever in the Garden of Eden had they not fallen from grace and thereby lost the potential for immortality that they once had. The idea that humans once had the capacity for immortal life but lost it is a recurring theme in many legends of the world.

Most important events or phases in the lifespan are usually surrounded by legend, poetry, and mystique. Birth, the rite of passage into puberty, marriage, death and other events are culturally embellished with traditions and beliefs. Man’s mortality, the fact that he will one day die, is a puzzle and is emotionally involving. It is not surprising, therefore, that matters of death and old age, and what the processes of aging consist of have been the subjects of speculation throughout history. The mystiques of the past gave way slowly to the advances of modern science. Continuing to evolve
are what we would regard as rational explanations of the natural phenomena of growing older and eventually dying. Wishful thinking lies behind many attempts to secure us from the disabilities of old age and to reverse the process of aging. People have sought through the ages, for example, a magical mud that they might rub on their skin to draw out evil forces that cause aging or some mystical water to bathe in that would purge the body of all its ills.

Gruman identifies three basic themes about human longevity that pervade our cultural background and have deep roots in history. He names the themes as: the Hyperborean theme, the Fountain theme, and the Antediluvian theme. The Antediluvian theme is the Garden of Eden approach that man had the potential for immortality, but through his lack of respect for the deity lost the gift. The struggle for mankind is then to return to immortal life in the next world by self-redemptions.

The Hyperborean theme is the view that somewhere in the world there is a group of people who have the secret of immortality and live for thousands of years. The point for mankind’s struggle for immortality is to seek out these people who have the secret of very long life. The quest is to find these remote people who have treasured their near immortality and discover their secret. It is of interest that today there is still a search for the very long-lived people of the world; it is still believed that somewhere in Peru or in India or in a remote part of Russia long-lived people still exist. Given the improvement in communication and travel, however, these stories do not have the same credibility they once did.

The belief that a remote people have the secret of very long life has been reduced in scale in recent years. Now they might be thought to live perhaps 20 or more years longer than other peoples. Still their secret is thought to be worth going after in the minds of many. Therefore, there are the treks to out-of-the-way places where a fortunate circumstance of living, diet or outlook promotes longevity.

The remaining theme is the Fountain of Life theme. This theme suggests that there are healing waters, often in a remote area of the world that must be discovered. These waters purge and heal the body and make one young again. Ponce de Leon sought the Fountain of Youth and our counterparts still seek it veiled in contemporary rationalizations. The modern counterpart of the fountain of life theme is found in the popular spas where one “takes the waters.” Napolean visited Vichy for the water and in the 20th century visits
to European spas remain popular. In these spas a mixture of supersti­tion and real benefit will increasingly be separated from the placebo effort that doing almost anything may bring about a physiological and psychological effect if you believe it will.

**Historical Myths About Aging**

The preceding suggest that there is a rich history of ideas about aging. These ideas, however, are encrusted in myths and supersti­tions which are contrived to deal with mankind’s anxieties about his own mortality. As mankind moves away from simple beliefs about perpetual life in a hereafter he becomes more concerned about length and quality of life on this earth. Sometimes one discerns that individuals who retreat from beliefs in immortality in another life become more optimistic about the prospects for life extension on this earth. In this way, it would seem that the history of religious thoughts is inextricably bound up with our aspirations for a long and good life.

One of the strains of Greek thought was stoicism whereby mankind should learn to submit to nature and accept death as a necessity. Stoicism, which later became the dominant philosophy of Rome, directed attention away from extending life and instead toward accepting death as something good. Cicero believed that old age was not a fault but that our reactions to it were flawed. He was prepared to suggest that reduced enjoyment of pleasure was useful in that it gave us time to pursue higher purposes of reasoning and virtue. Cicero thought that old men could make themselves useful and that the declining state of their bodies was not as important as the development of their minds. Gruman points out that this is the basis in stoicism for apologism in which one does not concern oneself with modifying the natural course of life but in adapting to it.

A thoughtful review of Roman thoughts about aging has been prepared by Robert Kebric in the paper, “Social Gerontology in Pliny’s Letters: a View from the Second Century A.D.” He believes that Greco-Roman society regarded old age as life after 60 and quotes estimates of one fifth of the population surviving to age 55. Cicero’s earlier work, DeSenectute (On Old Age), undoubtedly influenced Pliny the Younger’s view about aging and according to Kebric contributed to Pliny’s positive, albeit, stoical views of old age. Apparently upper class Romans did occasionally live to a very old age bringing
with it thoughts about retirement and fears of the accompaniments of old age. It would appear that the Romans almost 2000 years ago thought about growing old and its dilemmas in ways that are almost contemporary in their content, and Kebric quotes Pliny, "... when shall I reach the honourable age which will allow me...a graceful retirement, when my withdrawal will not be termed laziness but rather a desire for peace," Kebric (p. 21). What is different about today is that modern science seems to offer an alternative to stoicism, i.e., we can do something about the conditions of old age. Of interest is the fact that in Rome legal actions were taken by children of parents who were deprived of their patrimony because of second marriages.

Eastern cultures have also had their legends or teachings about aging. They also vary in the extent to which they concentrate on what man must do in the present to insure the good life rather than what one must do in the pursuit of spiritual exercises to insure a place in an immortal hereafter. The contemplative life of Buddhism actually tends to place greater emphasis on the here and now than on the hereafter and also seeks to do this through a control of cleansing of the mind. It is only recently that thought in the United States has been to any appreciable extent influenced by thought from Asia. The human wish for a long and good life on this earth is, of course, a universal concern of all cultures.

Chinese prescriptions for living well go back several thousand years. They are marked by a greater emphasis than in the West upon control of one’s life through diet, exercises, methods of controlling breathing and even methods for dealing with sexual impulses.

In China, Taoism has prescriptions for carrying out physical exercises and sexual activity. In Gruman’s history (1967), he points out that exercise was regarded as a means of lengthening the life, but also keeping the body flexible. Furthermore, a period of physical exercise was suggested between sexual intercourse as a way of preserving vitality.

One variation of Buddhism Zen has promoted an emphasis on the here and now in behavior, but also carried with it an element of atheistic desirability. Whereas Western thought tends to inordinately respect and admire the young and devalue old items, Zen Buddhism suggests that old objects can take on a charm and a beauty of their own. Related concepts are sabi in which, for example, an old rusted pot takes on a surface color of charm. Thus a rusted pot might show
the reddish brown color and a surface texture that is thick and coarse to the touch and be "very sabi." Western thought would tend to regard the rusted pot as deteriorated in beauty and sandblast it to restore it to newness, a fresh-from-the-factory look. Similarly, the adaptation of a plant or a tree to its climatic circumstances with time will show the effects of winds upon the molding of limbs that is to be appreciated. The adaptations that people make in their lives as they grow old is also to be appreciated. The Japanese theory of aesthetics, iki, places emphasis on the maturation of a person or object. In contrast, American aesthetics could be described as "fresh from the factory aesthetics." Once one takes the cellophane wrapping off an object, it deteriorates and becomes less valuable. In contrast, the quality of sabi would increase as an object is used. Frequently, Zen Buddhists would drop out for a period in late life to "get their life together" and then return. Here again the value of an aesthetic integration of one's life and old age moving toward a higher level of integration are elements of Buddhist thought.

Early ideas about aging were inextricably linked with religious views of the nature of life. Major religions have, for the most part, contained within them the thought of a life after death or another life after this life. The extent to which the beliefs in immortality of a supernatural basis underlie less interest in death and life on this earth shifted during the Renaissance. Less and less attention was placed on burying the deceased with goods and tools to serve them in the next world. In the Renaissance more thought was devoted to this life and ameliorating its conditions including the length of life, thus beginning to move from ancient religious-cultural views of aging and death to those of science. The modern science clearly has its roots in the Renaissance as does science itself. Science came to be regarded as the method for obtaining progress on earth in this life. Less interest was expressed in the return to the golden age of grace in which man would obtain immortality on the basis of his holiness rather than through the modification of life and its circumstances through science and the professions.

Influencing post-Renaissance Western thought were the English philosophers who in turn were influenced by the industrial revolution of England with its spread of the here and now materialistic philosophy. Among the English philosophers, Francis Bacon in particular has been credited with the encouragement of the scientific point of view toward human life including longevity, although he
also backtracks somewhat to the idea that we let past knowledge slip through our fingers. The study of longevity seems to show that methods and medicines for the retardation of age and the prolongation of life whereby the ancients not despaired of, but reckoned rather among those things which men once had and by sloth and negligence let slip, than among those which were holy denied or never offered. Modern experimental science was not yet apparent to Bacon, but he did expect that knowledge about aging and the control of the length of life was not going to be an easy matter. "...Men should cease from trifling, nor be so credulous as to imagine that so greatly work as this of delaying and turning back the course of nature can be affected by a morning draught or by the use of some previous drug; by potable gold or the essence of pearls or such like tools." Bacon attempted to provide a scientific basis for his ideas about aging, but his effort should be characterized as a search for scientific philosophy of aging. Bacon’s history of life and death is perhaps more of a common sense summary of what was known rather than a plan for scientific experimentation. Gruman characterized Bacon as "...more impressive as a prophet of a science as undoing the scientific work itself."

In its complex mixture of superstition, wishful thinking, desire for magic, elements of theology, religion and philosophy, the culture of contemporary science is hardly totally rational. The motivation underlying modern research on aging is hardly based upon a logical, objective, and non-emotional basis. Indeed, it has been pointed out that scientific ideas about aging have metaphysical elements in them. This suggests that aging is in large part an unknown and therefore we try to express and communicate about the unknown in metaphysical terms.

One of the influential influences of the 19th century scientific period was the collection of demographic data about human beings, their fertility, the frequency of the sexes, and mortality data. The French in particular were interested in demography, but their study of human existence found its expression in the work of Quetlet (1835). Being a Belgian he could profit by the philosophical ideas of the French Huguenots who escaped into Belgium. His book on "The Nature of Man and His Faculties" (1835) was perhaps the initiation of the modern systematic or scientific phase of research and the study of aging. One of the basic elements of this position is that the conditions of and influences on human aging are knowable
and that this knowledge can be obtained by the systematic pursuit of study or research. This is an assumption which we are still expanding that underlies the scientific period. Modern science assumes that the basis of human life is knowable and that knowledge is desirable and useful. There was philosophical resistance to the growth of empirical science in the 19th century not only with regard to research and aging, but in the total sense. From some theological positions man’s quest for knowledge about himself is not appropriate and better we should seek to prepare for the next life and not concentrate on the content of this life. For example, the religious overtones of resistance to the ideas of Charles Darwin in the last century have not subsided although now it is a matter of less an attack on his method of study than of the conclusions he draws from his data.

The Modern Period Of Aging.

The modern period of research and thought about aging was ushered in the Quetlet’s book in 1835. His statement that “the development and aging of man is lawful and knowable” was an assertion that scientists in other generations may not have been comfortable in saying. There is involved the assumption that this earlier knowledge will be useful. As pointed out earlier, there has been until recently a belief in the concept of progress, and identified with progress was scientific research. Apparently this has become suspect because one of the by-products of scientific research is the development of the atomic bomb. Thus, at present the concept of progress and its automatic linkage with scientific research is being called into question.

The second main figure in the emergence of the science of aging was Francis Galton, a geographer, anthropologist, and psychologist. He devised statistical methods to describe and test the data he obtained. He arranged a health exposition in Kensington Gardens, London in 1877. Through this health exposition flowed thousands of men and women who were associated with age. Two of the observations subsequently rediscovered were that there is a tendency toward the loss of high tone hearing in men and that there is a slowness of movement in older men and women. Some aspects of his information were not analyzed and reported until 1923 (Koga and Morandt). Out of that work came the concept of interactions and that there are constellations of factors operating in aging rather
than isolated variables.

One of the conceptual advances of the 19th century was the concept of the average man. Quetlet formulated the concept of the average man around whom extremes were distributed. This was the basis of the normal curve. This contrasted dramatically with previous thinking in which traits were not measured and thought to be distributed, but composed an essence and were categorical in nature as derived from Aristotelian thinking. Today, we recognize the range of individual differences in all human characteristics and it is surprising to think that this basic concept rose only in the last century. There was in the last century a certain buoyant optimism about science. Laboratories opened to study many aspects of nature especially in Germany where the period of enlightenment encouraged the spirit of science. The spread was not immediately universal however, and it is to be noted that Oxford University did not create a department of psychology and a chair until after World War II since philosophical opinion at Oxford had it that there could never be an empirical science of mind.

Twentieth Century Thought.

There were some giants in the early part of the twentieth century who gave some time to thinking about age. The great Russian physiologist Pavlov who won his Nobel prize for research on the conditioned reflex, thought that aging was accompanied by weakening of conditioned responses and in particular that the nervous system lost its potential for inhibiting responses. The epidemiologists at Johns Hopkins University reported studies that showed that people who have long lived grandparents tend to live longer than the average person in the population. This, of course, led to an overgeneralization about the potency of the factor of heredity of human aging. To be sure, our genetic background is a factor in determining how long we live and the diseases we become susceptible to; however, life circumstances are now known to modify the expression of our potential for longevity.

One of the features of the twentieth century was the focusing of interest on human aging because of the dramatic improvements in the average lifespan resulting from the control of infectious diseases. In the United States in 1900 the average lifespan was about 47 years. It increased to 72 years by 1980. This increase of 35 years in average
life expectancy was more than life expectancy had improved from pre-Roman days to the last century. Such a dramatic increase in the average length of life changed many concepts. Previously retirement was relatively rare in the sense that old people were relatively rare. There were always old people, but in the twentieth century, old people and retired people became very common or frequent. Because of the presence of many older people in society we had to change the focus from children in early life productivity toward a more balanced or lifespan approach to human existence.

In 1923 G. Stanley Hall, the President of Clark University, wrote his book on *Senescence: The Second Half of Life*. Previously, he had written about the psychology of adolescence, but in his later years he reported some studies of attitudes towards death and he reviewed the biological, medical, social and psychological literature up to 1923. Such publications, along with the dramatic shift in the demographic picture of America, showing that the most rapidly growing part of the population were the aged, resulted in a very different climate in support of research and inquiry about human aging.

Although there was little systematic interest in aging, there were individual scientists who were curious and did research on aspects of aging. Among the early major biologists interested in aging were: Minot (*The Problems of Age, Growth and Death, 1908*), Metchnikoff (*The Prolongation of Life, 1908*), Childs (*Senescence and Rejuvenescence, 1915*), the Pearl (*The Biology of Death, 1922*). Some of the explanations of these early scientists have not held up with time, but they were curious well-trained thinkers and were still pioneers in the sense that major research programs on aging were still in the future. Metchnikoff believed that yogurt cleaned the gastrointestinal track of bacteria which he thought caused toxicity that increased with age. It has subsequently been proven that some gastrointestinal bacteria are beneficial to animals. Pearl investigated longevity in families and found that individuals who had long lived grandparents and parents lived longer than the average population.

The 1930's marked the beginning of systematic thought about aging and exchange of information between research projects. In 1933, a book edited by E.V. Cowdry was published (*Arteriosclerosis: A Survey of the Problem*). The book began to look at the relationships between aging and the changes in blood vessels of which arteriosclerosis is a part. A famous internist at Johns Hopkins University in the 1920's was William Osler who linked aging closely to
the state of the blood vessels in the body and developed a tradition that looked at the consequences of aging as resulting from hardening of the arteries. While the American investigators were stressing the relationship between calcification of arteries and aging of the cardiovascular system, Pavlov and his students in Russia were emphasizing the importance of the central nervous system. These two points of views still contrast today with some investigators looking at aging of peripheral structures while others are looking at the central regulatory or control systems.

After the publishing of the Cowdry volume on arteriosclerosis the foundation which sponsored it, The Josiah-Macy, Jr. Foundation, realized that aging of arteries involved other aspects of the organism. This led to a conference sponsored by the National Research Council and the Union of American Biological Societies at Woodshole, Massachusetts on July 25-26, 1937. The National Research Council also sponsored the Conference through its committee on the Biological Processes of Aging on February 5, 1938. In 1939 a volume was published that initiated the modern era of gerontology. This was E.V. Cowdry’s volume “Problems of Aging.” The seminal character of this volume lies in the fact that human aging is regarded as a product of biological, psychological and social forces. Thus began the modern tradition of regarding aging as a multifactorial issue and not caused by a single gene or a single defect in an organ system. The fact that Cowdry’s volume was rapidly assimilated is shown by the fact that it was reprinted in 1940 and another edition was published in 1942.

Many other influential organizations were beginning to hold conferences on aging in 1940 and 1941 such as the American Chemical Society, the American Ortho Psychiatric Association, The Medical Clinics of North America, and The National Institute of Health. On May 23-24, 1941 a major conference on mental health and later maturity was held that was a culmination of much of the thinking that was going on at the time. Conferences of that period and the zeitgeist would have culminated in greater impact on social policy, practice and research had not the United States become involved in World War II before the proceedings could even be published. In 1941 the conference of the U.S. Public Health Service was opened by the Surgeon General who made these remarks, “Thus the maintenance of mental and physical health in the true senility is an object worthy of our most conscientious and extensive efforts.”
Furthermore, "senescence is not a disease nor is it all decline." Some functional capacities increase with the years as others diminish. This is particularly notable with certain mental activities. If we are to employ wisely the vast reservoirs of elderly persons only too anxious to be of use, it is of the greatest importance that as more precise information as to the changes in mental capacities which occur with aging become available those changes be noted and utilized. There is no greater tragedy for the aged than the unnecessary sense of uselessness which society now imposes upon them prematurely.

After World War II the energies of the country were devoted to housing, educating returning GI’s, getting our institutions back to normal. However, earlier thinking had planted its seeds and there was a momentum which was to emerge in the later decades.

It is too early to have a clear perspective on the years since World War II. Yet some of the events seem portentous. For example, in 1951 there was a national conference on aging sponsored by the Federal Security Agency, the forerunner of the Department of Health, Education and Welfare. This was followed up by White House Conferences on Aging in 1961, 71, and 81. It is not accepted that there is a demographic imperative to the issues of an aging population. In 1975, the National Institute on Aging of the National Institutes of Health was founded and in the same period we saw the Older America’s Act which established the Administration on Aging within the Department of Health and Human Services.

Clearly aging moved into its growth phase with systematic research projects, exchange of information and scholars regularly meeting to critique their work. The subject matter being as vast as it is results in a state in which we have many particulars but very few embracing theories. The early speculations about aging have proven to be far too simplistic. In matters of aging apparently nature was not revealing her secrets readily. Now graduate students in Universities are pursuing research on aging in a wide range of disciplines from molecular biology to anthropology. In higher education the University of Southern California established its Rossmoor Cortese Institute for the Study of Retirement and Aging in 1964. This University has now become the largest producer of scholars with doctorates in the disciplines doing research on aging. Research on aging now would appear to be in a new phase with most universities beginning to conduct research and teach about the subject matter. In the public arena we are hearing increasingly focused debates about health care
systems, social security, retirement, and housing among others. Politicians are increasingly sensitive to their positions with regard to older adults. For the researchers, there is still the question of why living systems undergo transformations with age and how society can best utilize the wisdom and skills of older persons.¹

Later Research About Aging

The earlier research about aging — as carried out in the sixties — was discussed in Chapter III. We return now to the research approach and review what has subsequently been accomplished.

THE PETERSON — HAMOVITCH RESEARCH

Subsequent to the first major research effort on the part of the staff of The Cortese Institute a number of significant studies developed to illuminate the field of aging. These studies were in different areas but they illustrate the importance of the impetus given to aging research by the Leisure World funding and interest. The most major study was a follow-up study to that done by the institute on needs and motivations of in-movers already detailed in this report. This study was entitled "Housing Needs and Satisfactions of the Elderly." It was conducted by Co-directors James A. Peterson and Maurice Hamovitch. It involved studying eight different housing sites for the elderly by means of over eighteen hundred interviews. A report of that study follows.

The focus of this study moves the analysis of housing for the elderly away from a simple comparison of expressed satisfaction with various types of housing into a more complex analysis of the global concept of housing fulfillment and of the specific ways various housing accommodations meet the needs of individuals. The process of analyzing the components of housing satisfaction in relationship to the expressed needs of older persons offers several outcomes of both theoretical and utilitarian usefulness. It enables us to compare the nature of housing satisfactions for specific types of housing facilities according to selected occupational, cultural, social-economic and personality characteristics of residents. It also furnishes us with some

¹. End of Birren material
hierarchy of functional needs these individuals wish housing to perform for them. It would seem more meaningful to study the degree of fulfillment for each of these various and unique segments of the population than to stress the one best type of retirement housing for the entire population.

The goals, then, of this research effort may be stated:

1. To identify the needs which older people express with regard to their present housing, the importance of these features, and the extent to which their current housing meets these needs.

2. To determine the general satisfaction with regard to each of these areas of concern.

3. To compare the areas of concern according to their present housing situations.

4. To compare the above according to selected occupations, cultural, socio-economic characteristics and life style of the residents.

Research Procedure

The basic inquiry of this study is directed toward an examination of housing functions held desirable by older persons, a measuring of the extent to which their current housing meets their stated needs, and finally, an estimate of satisfactions derived by the elderly from their housing. The study was designed to ascertain whether persons of varied social backgrounds and living in different housing situations have dissimilar housing requirements and satisfaction levels.

A research instrument was developed and pretested to examine those questions and to permit the data to be analyzed statistically. Representative samples of various socio-economic backgrounds were identified and described. After the samples were chosen, interviewers were selected and trained to conduct the inquiry. Following the field work phase, the data were coded into an analytical structure, keypunched, and processed at the University of Southern California Computer Sciences Laboratory. The final task was the preparation of this report.

An interview instrument was devised to measure housing function,
and to provide the basis of necessary data to answer the previously stated questions. Initially, the dimensions of housing were established so that pertinent questions could be systematically generated to examine the research questions. The definition of the key dimensions allowed the researchers to interpret the “meaning” of housing for each respondent in terms of the ratings of importance, the actual situation, and expressed satisfaction on each of the dimensions. Three basic questions were used to explore each dimension. They were:

1. What are the needs older people wish their housing to meet, and how important are these needs?
2. To what extent does housing currently occupied by older people satisfy these stated needs?
3. What is the extent of satisfaction felt by older people in regard to the specified dimensions of housing?

This triad of questions related to each dimension was then incorporated into the schedule within logical subject areas to provide continuity and ready transitions when administering the interview. The groupings relating to the housing function and satisfaction were:

1. GENERAL LOCATION, which includes climate, urban-suburban dichotomy, terrain, view, and location in relation to facilities, services and professional persons and services.
2. PERSONAL AND SOCIAL PRIVACY, which includes privacy between neighbors, noises from outside, or privacy within the home.
3. FAMILY INTERACTION, which includes interaction with children, other family members, or having a home designed to accommodate such interactions.
4. FRIENDS OR NEIGHBORS, which includes kinds of neighbors on dimensions of age, class, interests and activities, religion, race or color; and dimensions of housing to facilitate interaction with friends.
5. RECREATION AND LEISURE examines housing as it facilitates present activities.
6. HEALTH questions examine the respondent’s current estimation of his health condition and the importance of health and safety features in housing.

Two measures were used in this research: (1) Life Satisfaction Scale B, and (2) Housing Fulfillment typology. A description and rationale for the use of these measures follows:

Nancy Morse (1953), in her study of job satisfaction among clerical
workers in a large scale organization, utilized a method of measuring human satisfaction which was initially developed by Mann at the Survey Research Center at the University of Michigan. It was her contention that an individual's satisfaction (morale) was not a single dimension, but was related to what he wanted from a situation (environmental return) would constitute the basis for satisfaction; i.e. "those in need-fulfilling environments would be more satisfied." It became obvious to her, however, that another factor played a significant role in the extent to which a person should be satisfied. This variable was the strength of the individual's desires — his level of aspiration. She expressed this relationship as:

\[ S(\text{Satisfaction}) = f(T_1 - T_2) - f(T_2) \]

In other words, satisfaction is equal to a function of an individual's expressed needs less the needs not fulfilled, less a function of the environmental return. The more environmental return available, the greater the amount of return to the individual with strong needs; and therefore, the greater the need fulfillment. \( T_2 \) in the first part of the formula refers to the amount of tension remaining (needs remaining). The greater the amount of needs remaining, the lower the satisfaction. The operational formula would be:

\[ S(\text{Satisfaction}) = ER - (T_1 - ER) \text{ or } ZER - T_1 \]

In using the above formula in this study of housing fulfillment it was necessary to revise it.

The revision allows the analysis of fulfillment to retain the two factor approach to the problem, but it will generate mutually exclusive typologies based on the probable combinations. The High and Low Fulfillment categories are similar to the polar extremes generated by Morse's formula. The intervening values will be distributed in the following manner:

**HIGH F** = Completely + Very Important; or Completely + Somewhat Important

**MODERATE F** = Mostly + Very Important; or Mostly + Somewhat Important

**SOME F** = Completely + Not Very Important; or Completely + Not Important At All; or
Mostly + Not Very Important; or
Mostly + Not Important At All

LITTLE F =
Hardly + Not Very Important; or
Hardly + Not Important At All; or
Not At All + Not Very Important; or
Not At All + Not Important At All

NO F =
Hardly + Very Important; or
Hardly + Somewhat Important; or
Not At All + Very Important; or
Not At All + Somewhat Important

In addition to the five typologies defined above, the categories can be looked at as a dichotomy; i.e. High and Low Housing Fulfillment.

The overall Fulfillment Score consists of the mean of all specific dimensional fulfillment scores.

Housing Fulfillment, therefore, is considered a global construct; and the elements of which contribute some general meaning to the entity. The entity of Housing Fulfillment represents a totality of feeling toward one's housing environment.

The Sample

As mentioned previously in the survey of literature, most housing investigations have concentrated on samples which restrict the description to that of a single group of people, one geographic location, and/or either dispersed or congregate housing. The samples for this study were selected to allow for interviewing individuals representing a wide range of socio-economic conditions and living in a variety of housing arrangements.

In the highly mobile, changing urban communities represented within Los Angeles and Orange Counties, area probability sampling based on out-dated 1960 census data was deemed impractical, if not impossible. It was decided that stratification on age and economic condition of respondents and housing type would provide representatives qualified to speak on the conditions of housing among the older population. Using age 50 as a lower age limit, individuals living in dispersed or congregate housing were contacted first by personal letter, which was followed by a visit by an interviewer to the respondent's home.
A number of sampling methods were employed in the selection of respondents, dictated primarily by the quota nature of sample designation. In other words, it was important to contact as many different types of people living in as many different types of housing as was financially feasible. In some instances, a total population was our sample; in others, random sampling was employed; and in a few, we were restricted by administration policies, or to volunteer respondents, in the representation from these sites. Each of these idiosyncracies will be discussed whereas, facility or interviewing allowed oversampling in others. The initial sampling goal was:

S1: Residents of a middle, upper-middle class retirement village located near the coast. (N=400)

S2: Residents of a middle class retirement village located in a more arid, warmer, central California location. (N=100)

S3: Low income individuals living in congregate housing situations as well as dispersed housing. (N=200)

S4: Denominationally sponsored congregate housing for retired individuals. (N=100)

S5: Older trailer park residents. (N=100)

S6: Two matched samples (N=200 each) of lower-income individuals living in dispersed high age-density areas and low age-density areas. (N=400)

S7: Control group of 400 matched to the residents of the S1 sample who are living in age-heterogeneous areas. (N=400)

S8: Outmovers from S1 retirement village. (N?)

Summary of Research Findings

A. Location, Design and Cost. There is little difference in the responses of the total sample in evaluating the location, design and cost of these differential housing facilities that one is tempted to
conclude that housing is not a major factor in life satisfaction. However, this conclusion would overlook the fact that each of these respondents has chosen his dwelling place and location with its given cost. Those who choose to live in trailer courts did so because some features of this style of living appealed to them. The persons in the coastal and desert communities who moved away from the urban centers and chose a retirement village found aspects of those villages that appealed to them. This is also true of those who selected the urban denominational high rise apartments. On the other hand, we found no differences in satisfaction between the sample in the coastal community and its matched sample in the urban community. It must be concluded that individuals have styles of living and personality dimensions which predispose one to adjustment in the type of setting they choose. Once having made that choice it seems to be one which gives them satisfaction and matches their economic means.

B. Housing Fulfillment in Terms of Individual Variables. The following generalizations may be made on the basis of the analysis concluded from the relationship of general fulfillment to specific satisfaction variables:

1. Living in a single dwelling is related to a higher sense of housing fulfillment than living in any other type of housing arrangement for all groups where a comparison was possible.

2. Owning one's living place is related to a sense of higher housing fulfillment than any other type of relationship as shown by those groups which demonstrated multiple arrangements.

3. Location is an important criterion of housing satisfaction, but it is not decisive as indicated by the fact that many individuals reported satisfaction with their location, but a low sense of fulfillment in terms of their total housing situation.

4. Design is an important criterion of housing satisfaction but it again is not decisive as indicated by the fact that many individual respondents were very satisfied with the design of their houses and communities but still feel a low sense of general housing fulfillment.

5. Cost is an important criterion of housing satisfaction, but being pleased with the cost of housing does not guarantee a general sense of fulfillment in housing. The urban retirement hotel Low Age Density, High Age Density, DPSS, and Trailer Parks samples showed little correlation between satisfaction with costs and housing fulfillment. Less than half of the respondents who were very satisfied with costs of housing indicated a sense of fulfillment.
6. In general, those respondents belonging to the higher SES categories seemed able to purchase a better location, a better design of their housing facilities and to manage the cost factor which placed them in the high housing fulfillment group, while those belonging to the low SES groups could not manage the same advantage. Even if they were satisfied with their location, or design, or cost, their total housing fulfillment response was negative.

7. The extreme comparability of responses of the Coastal respondents and their matched sample indicates that neither group was more satisfied nor more fulfilled than the other. As both groups have an aspect of self-selection; i.e., the retirement community group chose to move there and the matched sample chose to stay in integrated housing, we must conclude that there are life-style differences which are best expressed for these groups by living where they choose to live. In conclusion, this probably means that there must be multiple opportunities for housing the retired and that a pluralistic housing situation best fits the needs of American retired persons.

8. If possible, retired individuals should be encouraged to continue to own their real estate, for owners were superior in a fulfillment to any others. This probably infers changes in our property tax laws to enable those who live in houses they have purchased to retain them on lower incomes, or, when offered other alternatives.

C. Overall (global) Fulfillment. The following line chart demonstrates the relationship of average fulfillment for each of the samples studied in this project. Each of these figures represents a composite or average of eleven other fulfillment scores for residence area, facilities and services, soundproofing, privacy, family interaction (location), family interaction (design), Friends and Neighbors, Assists to Friends and Neighbor Interaction, Leisure Time Activities and Health and Safety. The scores represented here are abstractions of those typologies and do not represent the differences which can be seen by looking at the profile for each sample. These overall fulfillment scores are averages, and so obscure some of the significant differences in needs and fulfillments seen in the other presentations. However, about the same differentials between samples occur in this profile as in the previous one on housing satisfaction, the higher the SES of the sample, the higher the housing fulfillment.
<table>
<thead>
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<th>Section</th>
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<tr>
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<td></td>
<td>A. Hotel</td>
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<tr>
<td></td>
<td>B. DPSS</td>
<td>2.74</td>
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<tr>
<td>IV.</td>
<td>Denominational</td>
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<tr>
<td></td>
<td>A. High Rise</td>
<td>2.015</td>
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<tr>
<td></td>
<td>B. Black</td>
<td>2.41</td>
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<tr>
<td>V.</td>
<td>(Windsor) Life Care</td>
<td>2.22</td>
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<td>VI.</td>
<td>Trailer Parks</td>
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<td>VII.</td>
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<tr>
<td>XI.</td>
<td>Outmovers</td>
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General Conclusions

1. One of the major issues of our time has to do with segregated communities where the age limit on occupancy insures age grading in the housing area. This trend has been widely attacked. Our findings are quite specific on this point. We asked all of our respondents about their preferences in terms of age. The respondents wanted to live with people their own age but some of them wanted in addition to have younger persons in the community. They were almost unanimous in their opinion that they wanted no young children in the neighborhood. This conclusion reinforces an earlier finding by one of the authors in a previous study in which this same tendency was strongly expressed (Peterson, 1965). They also wanted people about them to come from the same social class and the same ethnic background. The only diversity that they would choose would be to include people from different religions. It seems to us that they are saying in general that they wish for neighbors and friends the same kinds of persons with whom they grew up and were socially involved.

2. Older persons are equally satisfied in living in a great variety of housing situations. In planning housing for the elderly the private and public planners must include in their plans a wide variety of options. We live in a time when differential life histories prescribe a pluralistic solution to housing. The argument as to whether congregate or dispersed housing is superior for the aged is irrelevant, according to our data. Both are necessary and no overall plan will meet the expressed needs of the older persons if it does not include the widest list of alternatives in terms of ecological situation, age segregation and living and social plans.

3. We indicated that there were important exceptions to the general conclusion that individuals are satisfied with a wide range of housing possibilities. These exceptions are seen to be individuals who are characterized by low SES ratings, — they are poor. Those groups that showed the lowest satisfaction with either location or design were the ones who could not purchase adequate location or good design. High fulfillment correlates with income that permits one to choose the location and design that makes for comfort, convenience and contacts.

4. The importance of access to facilities stands out. A very important consideration on the part of all samples was their need to
be close to shopping facilities, to restaurants and to recreational facilities. Other studies have shown that when proximity to recreational facilities increases, participation goes up, (Hamovitch, Peterson, 1966). Equally important was the stress on the need for adequate transportation so that one could reach a doctor or lawyer or friend when that was essential. This factor was stressed by the participants in the White House Conference and its importance is underlined by this study.

5. Another generalization which follows from a previous one but which seems important enough for individual stress was the attachment of individuals to the place where they wanted to live. We found that city dwelling was preferred by those with low income; suburbs or retirement communities by those with higher incomes. Everyone has for retirement developed a "way of life", a set of "community roles" or "day to day expectations". One should not be surprised that these individuals wanted their place of housing to provide for continuity of life style. For instance, those of low income are not nearly as concerned about traffic noise as those with higher income. In fact, after 65 years of traffic noise, a quiet place in the country might predispose to anxiety. We sensed in our data the imperative to plan housing that would permit the older person at least a modicum of continuity with all those conditions (good or bad) that made up his social life span before he retired.

6. America has a great mythology about the importance of the family and it has influenced our thinking about housing and the social life span of our senior persons. But many studies indicate that the high mobility of our society has placed in question the viability of family bonds. In this study we have some evidence, because most of our respondents placed little importance on living close to their family. Children were most important but less than one-third of any sample group stressed the importance of living close to father, mother, sister, brother or any other kind of relative. The telephone and airplane has provided for many older persons a kind of security that is important to them but that does not preclude loneliness. Any significant study of housing arrangements must consider the isolation of older persons from all their previous significant associates and plan ways of increasing the friendship networks of those who have lost previous meaningful contacts through the inevitable decrements of mobility or death.
Conclusion

This study has some methodological significance for two basic reasons. It provided through the utilization of the fulfillment scale a mechanism for isolating those housing variables which had more importance than others. To simply ask how satisfied one is with a housing feature gives no indication at all as to whether this item is of major or minor importance. By asking not only the satisfaction degrees but relating them to their importance to the respondent we were able to differentiate between those factors which were regarded as crucial and those which were more trivial. We regard that methodology as a significant forward step. A second methodological advance was our matching of the fulfillment scores with life satisfaction scores. If an individual states that he is wonderfully and completely fulfilled in his housing needs and wishes but his life satisfaction level is near zero we are able to judge to some degree whether or not housing is significant in terms of total life satisfaction. Indeed we found that most persons in this study had a relatively high degree of fulfillment in their housing but that did not guarantee life satisfaction.

There are more important aspects to aging than the roof over the elder’s head, or the safety bar in his bathroom. Housing is an essential, but it cannot by itself change the morale of older persons. It is but one of an interwoven, interdependent and mutually important series of factors such as health, income, access to social interaction, friendships, intimates, life histories, educational and religious opportunities, attitudes of others and of self . . . all of which together make up a complex physical and personal environment which is predictive of life’s satisfaction.

THE DEVRIES STUDIES

Dr. Herbert DeVries in his years at Laguna Hills contributed not only to the education of the inhabitants of Laguna Hills but to our general knowledge of the contributions of exercise to the well being of older persons. He conducted a number of studies. Most of them involved a sample of some sixty male persons who exercised under his direction for one hour three times a week. The men were carefully monitored for both physical and psychological reactions to this regimen of studies. Not a single incident of negative aftermath occurred to any of these elderly persons who exercised. On the
contrary the subjective responses of the subjects was altogether
positive as to both physical and psychological well being.

It was proved that exercise plays a large role as one of the impor-
tant means to prevent physical deterioration and to maintain physical
well being in the later years. The amount and types of exercise in
which older persons participate serve as an antidote to certain kinds
of physical stress and the subjective experience of pain but they also
prove to have an immediate effect upon the state of emotional stress,
life boredom and general morale.

With aging, muscle cells decrease in number. With this the
transmission rate of impulses through the nervous tissue loses about
15 percent in motor nerves and 30 percent in sensory nerves be-
tween twenty and ninety years of age. There is also the tendency
for many older persons to relocate muscular cells with fatty tissue.
Exercise, DeVries proved, may not reduce weight very much but
it can help replace the fat with muscular tissue. Regularly, exercise
can increase muscular strength, increase the capacity for ventila-
tion (the amount of oxygen used), cardiac output and blood flow.
As long as nerve tissue is intact, loss of functioning in aging muscles
can be actively and often significantly combated.

A further gain from consistent exercise is its tranquilizing effect.
Exercise has much greater calming result than does meprobamate,
one of the most frequently used dieting drugs (DeVries,(1972). A
fifteen minute walk for example may have a very meaningful tran-
quilizing result even for an hour after. Exercise also can reduce high
blood pressure. A great case has been made by Dr. DeVries
experiments for the importance of habitual, lifelong, rigorous physical
activity as a preventative measure against obesity, high blood
pressure, lassitude and low morale.

OTHER SIGNIFICANT STUDIES

Several students at the Cortese Institute for the Study of Retire-
ment and Aging have centered their research efforts at Leisure
World. One of the most significant studies was done by James
Matthieu, who wrote on “Dying and Role Expectation: A Com-
parative Analysis.” Matthieu used a comparative sample from Mon-
tana, Pasadena, and Leisure World to study attitudes toward death
and dying. He found that most persons do not want to use mechanical
means to prolong life, that they wish to die at home, and that they
wish families and friends to attend their last hours. His study shows that current practices offend most older persons. In addition, Housang Poorkaj did his doctorate dissertation for the University in which he compared a Seal Beach sample with a matched sample from Pasadena in comparing those samples on the basis of socio-cultural variables. His sample took one hundred persons from Seal Beach Leisure World and two hundred from Pasadena. Also several significant M.A. theses were completed using persons from Laguna Hills as the sample.

CONCLUSION

In the beginning Leisure World provided sufficient funding for the Cortese Institute to begin its research efforts. They have now become world famous for their depth and value. It provided persons for its samples that augmented the work of the Institute. It stimulated the researchers from USC to delve in depth into some of the social and housing problems of older persons in our society. It challenged the Institute in trying to answer some of the problems that arose in the early days of Leisure World thus setting an incentive for the Institute to attend to a consultative role in its total outreach. On the other hand the Institute gave the burgeoning Leisure World management a grasp of some of the fundamental needs and goals of its clients. The interaction was profitable and productive for both institutions. Leisure World gave the Institute a fundamental direction for its community, educational and research programs which have persisted to this day and the Institute gave the management of Leisure World an insight about the nature of its clients which has underwritten much of its most successful housing efforts.

We are now ready to return to our own Leisure World and to look ahead at the future yet to come. We will then, in that final chapter, seek to determine what the role of Leisure World should be as retirees continue their search to fulfill retirement dreams.
XI

Leisure World
Looks Ahead

Introductory

In the beginning there was a dream about a new kind of retire­ment community that would greet its first residents on September 10, 1964. In the preceding ten chapters we have seen how that dream evolved and then how Leisure World developed through the first quarter century that we are celebrating in 1989. It is appropriate, therefore, that we now pause and look in perspective at what we are, and what we want to be, in the years that lie ahead. We know that we have great resources that can be the basis for some kind of a future. We need, however, to review these resources thoughtfully and to evaluate them carefully as a basis for determining how we can best utilize them. We need to relate these resources to well-considered goals and to determine how best we can maximize the fulfillment of retirement dreams.

The approach we have selected in this chapter will be along the lines used by any well-managed organization — whether business or nonprofit organization — as it formulates policy and moves to maximize the welfare of the particular organization. In accordance with the framework of that process we will first consider our Leisure World resources. Here we are concerned with our strengths and limitations as applied both to physical and other types of resources. Next we will turn to the environment which is around us — both immediately beyond our walls and in the larger outside world. Additionally we will be interested in certain more internal types of environmental factors. In all of this we seek to identify trends and directions and the extent of controllability. From these we will move to identifying and evaluating our available options. These options in various ways reflect the fit between our resources and the environment with the different opportunities and constraints. This evaluation will then be the basis for determining what our goals should actually be. What do we as Leisure Worlders wish to achieve
in the next five or ten years and in the quarter century that lies ahead? Our final concern will then be the major approach to achieving those goals — the strategies, policies, and implementing actions and procedures. The overall core objective in the total review process is to enable Leisure World and its residents to maximize the continuing fulfillment of retirement dreams.

Resources Of The Area

A look at our resources should really begin with the fact that this is America, a wonderful country with wide and substantial riches. As we then narrow our view we next focus on Southern California, in the middle of which is our own Orange County. This is the world immediately outside our walls. Here we can start with the extremely moderate climate, which has attracted the new high-tech type of industry and a wide range of service professionals. Especially, also, it has attracted people who wish to live in this moderate climate, where they can avoid the rigors of very hot or very cold weather. It has proved to be especially attractive to people in their retirement years. Sunny days with warm sun and cool breezes are typical through most of the year, and evenings are only rarely a problem. The more limited rainfall and less available below-surface water are possibly longer term problems, but presently it appears that adequate water is reasonably available from Northern California. In combination with such water, the land makes possible a wide range of flowers, vegetables, and tropical-type trees.

Other natural resources go beyond climate. On the west are beaches and waters of the Pacific Ocean, and to the east are small mountains. These natural resources make possible the recreational activities of swimming, boating, hiking, and camping — to name a few. The climate and natural resources, plus the people, then combine to spark a profusion of extensive housing, recreational facilities, theatres, shopping malls, hospitals, small businesses, and a wide range of support groups. Especially noteworthy is that cultural activities have become available through the construction of the Center For The Performing Arts, some fifteen miles away in Costa Mesa. Offerings there include the best from the world around of symphonies, ballets, operas, and other musical entertainment. Located nearby in the same mileage range are also the academic campuses of Saddleback College, Chapman College, the University
of California, Irvine, and California State University, Fullerton. All of these institutions represent substantial resources in terms of faculty and student activities. In total, the physical facilities for work and play stand as major resources of Southern California.

Resources of Leisure World

When we look directly at Leisure World our resources will first, again, be viewed in physical terms. Here is an area of about 2100 acres, with hills and rolling ground. The resources here include the fact that the land is relatively stable as compared with much of the other area, and this, combined with its distance from the suspect faults of Southern California, should substantially reduce any serious damage from possible earthquakes.

The strength of Leisure World is also its location in terms of easy access via freeways and other good roads to the activities available in Orange County. Still another important resource is Leisure World’s good security. Because of intersecting public roads Leisure World is in five segments, but each of these segments is surrounded by some type of periphery wall, and entrance to the manors and other facilities is through supervised gates. While such gates cannot guarantee complete security, there is a deterrence that does provide a substantially higher level of resident safety than would otherwise exist, and that higher safety is the basis for a higher level peace of mind.

Next, we need to take note of the physical resource of adequate space in Leisure World around the individual or multiple manor buildings and clubhouses. This allows for trees, grassy areas, and various types of other open space. Included here also is the remarkable Aliso Park that lies along Aliso Creek as it crosses Leisure World. As a result, Leisure World can enjoy a combination of natural beauty and peaceful detachment that, in comparison with the congestion and rapid growth in the areas around us, comes through as a most valuable physical resource.

Finally, the eighteen-hole golf course, a nine-hole course and an executive course, over and above the high level of professional excellence for the playing of golf, provide a setting of beautiful open space that serves the entire community.

This is the basis for the often heard commentary that Leisure World seems like a large, scenic country club. This country club atmosphere
begins with the golf course but extends to all parts of Leisure World. In total, the physical resources of Leisure World are a major strength as we view the future. They provide a needed base as we move on to the still more important resource — the people.

People of Leisure World as a Resource

The character of Leisure World people has been made evident in many ways in the preceding pages of this book. Our interest at the present is to view in perspective the people resource as it now exists and as it blends with other resources for the look into the future. Of all our resources none are as important, or as valuable, as the people of this community. What we have in Leisure World is a group of some 21,000 people of broadly varied backgrounds. Included are teachers, doctors, engineers, scientists, writers, actors, artists, business men, and others. This breadth of background means that each resident can readily find other individuals with whom he or she can share common interests and have rewarding social and cultural relationships. A casual conversation with another resident will lead to the disclosure of personal abilities and accomplishments that are typically surprising and impressive. Somehow it seems that each new person one has just met has been more places, seen more things, and done things that are greater than one's own accomplishments. Such discoveries are indeed a humbling but enjoyable experience.

It follows also that people of such varied talents will have a wide range of personal needs and will generate a large number of community activities. Here is the basis for the many educational and recreational activities that exist in Leisure World. It has often been said that there is everybody and everything that one can do in Leisure World, and that if any individual person cannot find people or activities that are desired, there must truly be something wrong with oneself. Certainly the great range of people, with their wide variety of talents and interests, stand as a major resource of Leisure World.

The people of Leisure World can also be viewed as a resource in another important way — that of cooperative strength. Optimum size of a retirement community unavoidable involves many trade-offs of various advantages and disadvantages, but certainly one major strength of having 21,000 residents in 12,736 manors, sharing costs, is to provide major purchasing economies for the various goods and
services needed for the ongoing operations. This economy of scale is of course the reason also that the range and quality of the various amenities can be provided. This financial capability can perhaps be better appreciated when one realizes that one dollar added to the monthly carrying charge for each manor produces about $153,000 over a one-year period. A good example of the power of this cooperative buying is the range of extra channels that are provided for Leisure World's in-house television system. Such a range of station options would be extremely costly, if purchased by each homeowner on an individual basis. Similarly, there is a sound basis for providing buses, swimming pools, tennis courts, and the like.

Other Resources

While most of the resources fall within the just-discussed natural and people categories, there are a number of resources that are normally not recognized as being of that character. One of such resources is the track record of success that Leisure World has now earned through its twenty-five years of experience. Leisure World, as it exists today, stands as a definitive demonstration of an approach to retirement living that has successfully stood the test of a twenty-five year span. As it happens, also, the greater number of retirees in our society has come about through a combination of an overall population growth and an extended longevity of life — the latter being made possible by advances in medical science and the life-extension benefits of a more active retirement life style. Under these conditions, the soundness of the original dream of Ross Cortese has become all the more valid and timely. As is true of any organization, its value goes beyond brick and mortar, money in the bank, and number of participants. The total value of its resources also reflects its success as a going organization. In total, it is from this high base of physical, people, and other resources that Leisure World appraises its continuing goals in a changing environment and determines its forward strategies and plans. What we have is an aggregate of resources that can make possible a wide range of options as Leisure World looks ahead and determines what its future should be.

The Changing External Environment

As Leisure World looks ahead from the base of the resources
just described we need to take stock of the environment, both as it now exists and as it may reasonably be projected over the years ahead. When we do this the message comes through loud and clear that we are in a high-growth area. This growth dimension pertains both to the dwellings in which the expanding number of people live and to the facilities and operations of the many individuals and organizations which provide services and products for the residents themselves. The impact of this continuing growth will of course be felt in a variety of ways. One of these ways is, and will continue to be, the increased traffic through the Leisure World area as it flows to and from all of the adjoining areas. This increased traffic will unavoidably mean wider streets and/or overpasses that in most cases will require more space for access and exit. All of this undoubtedly has an impact that is restrictive to our own movement within the total area. With the increased numbers come also more problems of air pollution and security. The increases are clearly a challenge to Leisure World to negotiate new arrangements that will best provide containment. Here what is sought is the best possible middle ground of opposing forces.

The environment around us can also be viewed in terms of the way the world around us generates and views the retirement phase of life. It is a world where the growing number of retirees of an expanding world population has combined with the previously mentioned greater longevity factor to increase sharply the numbers of retirees. And along with increased numbers have come greater expectations of what their retirement should be. In the years of not so long past it was normally expected that the aging parents should be living with their children and leading a quiet, protected life. Not so today. The retired parents want to be independent of their children and to seek active pursuits in previously unavailable directions. Now there is the opportunity to paint, to do woodworking to learn, to do photography, to achieve in sports, or whatever there was not time to do before retirement. As a result, the environmental climate in the world around Leisure World is dynamic and alive with the mounting expectations as to what retirement should be. Leisure World must therefore recognize these new dynamics and increasingly be prepared to deal with them. Moreover, the continuously rising standard of living worldwide makes it increasingly feasible for retirees of the future to have the capability, as well as the desire, to expect more from those who would claim to satisfy their needs. The world
of the future is indeed a world where retirees and the elderly will play a greater and greater role both in numbers and needs and with increasing influence.

**Technological and Scientific Dynamics.** The world around us we know is also a world of a new high technology and the related explosion of science. We live in a world where new scientific discoveries build more and more quickly from an expanding base of new knowledge. The impact is in all areas — business, travel, education, medicine, health support, construction, and the like. Especially noteworthy have been and continue to be the major breakthroughs and developments in electronic data processing. These developments have already found their applications in the manner and scope of the services and activities of Leisure Worlders. What lies ahead is of course not adequately known, but we do know that Leisure World must be alert to its responsibility to respond to new needs and opportunities. Yet to come may be completely new ways that Leisure World’s needs can be identified and satisfied. Most importantly, we must keep current and avoid major obsolescence as respects our facilities, the services, and activities.

**The Political World Around Us.** A review of the external environment of Leisure World cannot be complete without including reference to the movement toward cityhood in the area surrounding us. Presently portions of Orange County have become cities, while the remainder of the County is still unincorporated. There is also the question of what would be best for Leisure World.

On the one hand there are those who believe we can and should stay unincorporated — at least for the time being. On the other hand there are those who believe that ultimately all of Orange County will, in one way or another, become citified and that it would be in Leisure World’s long-run interests to ally itself now with a partner of our own choice. No one can be absolutely certain which approach will eventually be proven to be right.

However, on the basis of a petition signed by some four thousand Leisure Worlders and the affirmative vote of the Golden Rain board and the boards of the two largest housing corporations, the County authorities have placed on the ballot a proposal that the City of Laguna Hills be formed — this to be an area with about 43,000 people, including our 21,000 people in Leisure World. At the time this
book is being published, the decision of the voters is yet to be determined. It does, however, seem reasonably certain — irrespective of the election result — that Leisure World can, and will, be able to continue to control its own internal way of life in substantially the same way as is being done at the present time.

The Internal Environment

Environment as it pertains to resources and to appraisal of future options has both an external — as just discussed — and an internal dimension. What is the nature of that internal environment? We can first of all recognize that the typical internal feeling of a Leisure Worlder is a high level of pleasure and appreciation. Often heard comments are: “Aren’t we lucky to be in Leisure World?” “This is like living at a country club.” “Why go traveling when we have everything here we want to do?” “My children called last night and they said they were freezing and snowbound. Aren’t we glad that we don’t have that?” “I used to think it was great when Saturday came, but now almost every day is Saturday.” “I like to travel, but probably the best thing it does is make me more appreciative of coming home again to Leisure World.” Other comments also typically pertain to the desire never to leave Leisure World, where there are so many friends and so much that is making them happy. Admittedly there is bound to be someone who is unhappy and who is strongly critical of some or all of the various aspects of Leisure World life. But by a wide majority the internal environment is one of people who are enjoying the things made possible in Leisure World and who are interested in doing everything practicable to preserve Leisure World as it is.

An objective evaluation of the internal environment of Leisure World must at the same time recognize that all is not wine and roses and that there are certain built-in forces that can to some extent be threatening. One of these factors is the march of time that moves relentlessly in its impact on people and facilities. Here there is the unavoidable truth that every Leisure Worlder gets a year older as each year passes, so that therefore the community continuously ages. There is, of course, the offsetting factor of new residents who buy the manors which become available from time to time. But here again there are some built-in negative factors. Too often Leisure World is viewed by the uninformed outsider as a place where people
are inactive and relatively unattractive. There is too often a perception by the individual just retiring, or just recently retired, that to go to an adult retirement community will be rubbing shoulders with a lot of people who are too old — people that would dampen their own more spirited life-style. Somehow, the right message does not really get through. We know, of course, that proper communication to the outside world is itself a most difficult problem, and the deficiencies of such inadequate communication compound the problem. In this respect, fortunately, the Twenty-Fifth Anniversary celebration has proved to be a wonderful opportunity to send a better message to the outside world and it can well set the stage for a more vigorous plan of similar action for the future.

Other built-in negative factors can also exist in the way facilities and grounds are maintained. It is an eternal problem of life that we may see standards of maintenance through increasingly tired eyes and that we do not retain adequately the high standards that we earlier demanded. What happens then is that a visitor can see confirmed his apprehension that Leisure World is not the sparkling vehicle for achieving his or her own retirement dreams. A related factor here, also, is that the very proper search for economy in operating maintenance can become so great that it chokes off dollars really needed to keep Leisure World at the appearance level desired by buyers who have the financial and human resources to serve the best long-run interests of Leisure World. Related, also, is the built-in danger that genuine human compassion for the resident at the margin of financial capability may unduly press for lower operating expenditures and more accommodating carrying charges, as viewed by the aforementioned marginal resident. The problem here is, of course, that the level of support appropriate to the majority of residents cannot be changed to serve the needs of the most unfortunate. The recitation of all of these built-in negative factors is not to suggest that they are insuperable or that Leisure World will not cope with them. Rather, it is to alert us to the problem and to strengthen broader judgments to serve properly the goals and supporting needs of Leisure World as a whole. We now are ready to look at our resources as they relate to the total external and internal environment of Leisure World. We want to know what kind of options we have for the future life of our community.
Future Goals and Options

A serious look at what the future goals of Leisure World should be discloses a range of possibilities and options. At the one extreme, Leisure World can choose to grow older together and at the same time gradually reduce or eliminate the activities that Leisure World now enjoys — golf, tennis, swimming, clubs, and the like — replacing them with facilities and services that better suit the aging years of residents. At the other extreme, the goals can be to keep Leisure World and its amenities the same, with the same kind of residents who will maintain the same level of activities and services. This kind of goal has been especially well defined by Leon Bosch when he was president of the Golden Rain Foundation in 1987-1988 and was in fact formally endorsed by the Long Range Planning Committee. This statement of our goals and objectives is as follows:

“To preserve and enhance the quality of independent living for active adults in an attractively landscaped and gate-guarded residential community in which diverse recreational, cultural, and social facilities and amenities, essentially underwritten by an all-resident cost-sharing policy, accommodates and affords a pleasurable experience for the varied lifestyles of community residents.”

Special note can be well taken of such words as “preserve and enhance,” “active adults,” “attractively,” “diverse,” and “all-resident cost-sharing.” The words “preserve and enhance” speak for the aggressive character of the goals — as opposed to being passive or defensive. The word “attractively” speaks to the wide range of activities that were covered in Chapter V. And last but not least, the term “all-resident cost sharing” speaks to the importance of the cost-sharing concept in Leisure World. In total, the Bosch statement stands as the most authoritative statement as to what Leisure World’s goals and objectives should be. It seems clearly to support the view that the majority of Leisure Worlders want Leisure World to be kept as it is and has been, as contrasted to ultimately becoming a totally final-life phase inactive community. Admittedly, however, there are probably other people who do not make any judgment at all, but realistically these are also negative votes. The basis
of that latter conclusion is, of course, the truth that goals are not real goals unless they are both adequately defined and vigorously sought after.

**Cost - Sharing**

One part of the Bosch statement of the goals of LeisureWorld, as previously noted, is perhaps of such special importance that we need to further elaborate — the "all-resident cost-sharing" policy. This basic cost-sharing concept is that all of the amenities are equally available to all residents and, hence, that their cost should be equally shared by all. Here it is recognized that one resident may actually use a particular facility to a greater extent than another resident who may use the facility to lesser extent, or perhaps not at all. At the same time the other residents may be using other facilities in a very intensive manner. However, it can well be that having the option of using both enriches the lives of all residents, makes Leisure World more attractive, and translates into a higher market value for all residents. This is more a family approach, in which all recognize the common interest of all in providing the particular facility. There is also the financial saving that comes from the fact of avoiding the extra cost necessary for collection of special fees. The pressures in the other direction come from the need in specific cases to control the volume of usage and from the historical assumption that individual residents should pay totally or to a greater extent for the particular benefits they enjoy.

The total problem of fees and charges involves a wide range of considerations as they apply to the many varying activities, the different problems of usage, the extent of original commitments when Leisure World was first developed, and the like. For example, it is generally agreed that the original promotion of sales of manors in Leisure World included a substantive commitment of providing buses for residents to get from their manors to the clubhouses and to adjacent shopping centers. In the last analysis, the judgment made from year to year in regard to fees and charges is one that is negotiated as the best compromise or type of balance between a number of opposing factors. It is, however, a kind of index of the togetherness spirit of Leisure World. Its preservation is therefore part of the desired goals of the Leisure World community.
Quantifying Our Goals

When any organization defines its goals there is always the need for maximum quantification so that the achievement of goals over time can be fairly measured. We can often agree generally on the character of goals, since the individuals involved can interpret such goals in a manner more compatible with their own personal beliefs. Moreover, quantification is often difficult to adapt to many goals, and these difficulties exist in our situation in a very real sense. Nevertheless, quantification helps us think more effectively, and we must try to do as much as possible in that direction. As we search, therefore, for such quantification we come to average age as one available approach. Admittedly, age is not always a reliable guide to how well a particular individual thinks or acts. Some individuals are old at sixty-five and some individuals are models of vitality at ninety. There is, however, a major correlation between age and the level of activity.

If we accept the truth of average age as one useful benchmark of determining the kind of people that will best help us achieve our goals, how can we use it? Complete information is not available about average age from the time that Leisure World was first activated. When later, such calculations were initiated, the approach used was to use the ages of all individuals of record irrespective of whether those individuals were actually residents. When, then, the new approach was initiated in 1984 of using only the individuals who were living in Leisure World, the figure turned out to be 76. Since 1984 that average figure has consistently remained at 76 — thus telling us that we have in the past four years stabilized the average age at that level. This means that the lower age of the incoming residents is containing the increases in the average that come along with the aging of the residents already here. This is, of course, very encouraging, since such stabilization better protects the level of activity and related goals that the typical Leisure Worlder desires. We need only further to note that this average age figure is a useful guideline to alert us to any change in this over-all stabilization. It is, therefore, planned that these calculations be periodically monitored on a systematic reporting basis.

Other types of quantification can include the market value of Leisure World manors. The application here is certainly complicated by the wide spread between the different size and original design
cost of the various Leisure World manors. There is also the fact of inflation that affects all market values. Nevertheless, there can be some useful guides when we compare ourselves with the housing in the surrounding area of Orange County. Still other types of quantification include the records of utilization of the various kinds of Leisure World facilities. Here the problems of goal quantification overlap with reports that also are used for the various types of operational control.

**Strategies For Goal Achievement**

If now we know with reasonable clarity our goals — that is, what we want to be, say, in the five to ten years ahead — and on into the next quarter century — we need to determine the kinds of strategies we wish to formulate to best assure the desired goal achievement. The need for such strategies is all the greater when we consider the built-in negative forces that we discussed when considering the character of our resources. Strategies are the major approaches and policies by which we guide the actual day-to-day implementation. Our selection of such strategies is a judgmental one continuously subject to reappraisal and modification. We believe that the following have major merit for present purposes: (1) Effective communication to retirees and to those who are approaching retirement; (2) Use of outside professionals; (3) Formalized long-range planning; (4) Partnership approach to the Management Agent; (5) Aggressive maintenance and renovation. The basis of the need for such strategies is the eternal truth that the effectiveness of all organizations naturally trends toward deterioration unless systematic forces are at work to control, reappraise, and improve. The need for such systematic remedial forces is also consistent with the truth that excellence and accomplishment are never automatic and must be continuously earned.

**Effective Outward Communication.** The strategy of proper communication to the outside world is both to inform people about Leisure World and to convey the proper image to them. The people with whom we need to communicate are primarily individuals who are already retired or are planning for it. Additionally, there are organization executives who directly or indirectly are interested in helping employees with their retirement problems. Often also
messages received by all individuals will move in many random ways, to be picked up eventually by a particular individual who is really interested in answering the question of where and how to retire. The important thing is that the word goes out and that it conveys proper information, and does so in an attractive manner.

During the years when new manors were being built there was a great deal of promotion, including advertising and other types of publicity. These were the years of 1963 to 1980 when the major phases were completed, and then again in 1985 to 1987 when the final phase of the super luxury manors was developed. Thereafter there has been no professional type outreach other than an occasional story in newspapers and magazines — except now for the 25th Anniversary. Instead, there has been almost total reliance on word of mouth referrals through friends and relatives.

What the nature and scope of an adequate and effective outward communication effort should be is by no means clear. More detailed study will be required to evaluate how it should be done and at what cost. Clearly what is needed is not advertising in the usual sense, but, rather, a systematic review of things existing and things happening in Leisure World and a channeling of proper information to the media, the press, magazines, organizations, and the like. The marketing challenge here is to provide newsworthy information in a form that will be conveniently usable and that will project the well-deserved image of Leisure World as a desirable active retirement community. The strategy in its most basic terms is to project systematically on a regular time basis the reality of Leisure World as an active adult retirement community. It is that kind of an image that will attract outside interest and lead directly or indirectly to inquiries which then to some extent lead to more follow-up in the direction of looking seriously at coming to Leisure World to retire.

An Illustrative Story. An incident at a recent Golden Rain board meeting may help to define the conflicting issues which can exist when we evaluate a particular kind of action. One of the reports had related the fact that a small group of Japanese had recently visited Leisure World. It seems that somehow the success of Leisure World had come to their attention and they had decided that they would like to examine more closely what we were and how we operated. At the time of their visit one of the staff officers of PCM had given the visitors a several hours tour of our facilities and had responded
to their questions. At Leisure World, resident attendees at monthly board meetings are given the opportunity to ask questions or to make comments. In this case a resident raised the question of whether the time thus spent by the PCM staff officer was a cost effective use of his time. The view asserted was clearly that it was a suspect expenditure of effort. A lively discussion then took place and other views were expressed. These included the need to project the truth of Leisure World’s accomplishments and the benefits to be derived in terms of resulting higher resale values. Benefits derived here also might well have included national pride, common courtesy, and general good will. We could also reassert the need previously described to support the outward communication in a manner that will attract new residents of the quality of past and present levels. Our present interest in the incident is, however, only to illustrate how differently a relatively simple host tour can be viewed in terms of short-run and long-term aspects.

Use of Outside Professionals. It is an inescapable truth that any organization gradually becomes parochial — that is, that it gradually looks inward, talks to itself, and loses the freeness and vitality of the outside world. Often, too, there is excessive reliance upon its own members — in the case of Leisure World, its residents who in earlier years were active in particular areas of knowledge or skills. Often this is a way to get good expertise on a volunteer basis based on mutual interests in community welfare. At times, however, the expertise may be outdated or not sufficiently relevant to the problem being solved. The strength of the outside professional is that such an individual, or groups of individuals, is directly in touch with the outside world and is being continuously updated as to new theories, skills, and techniques. We know that even business organizations, who are themselves competing in the real world, will employ this device to best assure a broad and objective view about their own goals, strategies, and operational problems. It would seem logical for Leisure World to do likewise as it periodically reappraises its goals and deals with major decisions of strategy and policy. Such an approach protects us from missing new applications and fresh thinking that go beyond the special experiences of the past. It protects us also from the persuasive advocates of a particular Leisure World activity that tend to see the best solution as coinciding with their own special interests.
A good example of this kind of strategy was a recent action in using a professional land planner to survey the values of Leisure World lands not directly committed to its manors and to review the feasibility of alternate uses. Here is an issue where the judgment of special advocates for particular types of usage might be too biased and where overall objectivity is necessary. Here, too, approaches to new types of usage need to reflect the most up-to-date and broadly exposed experience.

Still another example a few years ago was when an outside security professional was brought in to take an independent look at the kinds of security problems that exist at Leisure World and the effectiveness with which Leisure World was addressing such problems. It is also interesting in this case to note that the individual who made the survey was later asked to join PCM. He then actually helped carry out the recommendations made.

It is true, of course, that there are many outside professionals who do not have the capabilities they claim to have and who sometimes try to exploit the client in one way or another. But the use of outside professionals does continue to be a useful strategy for effective achievement of goals.

**Formal Long-Range Planning.** Often both individuals and organizations endorse the concept of long-range planning but actually give such planning not much more than lip service. The heart of sound long-range planning is thoughtfully projecting where one wants to go or be at a particular time, so that actions taken today can not only serve current needs, but also move us toward the longer-range objective. Doing such long-range planning effectively normally requires an established procedure that can provide the mechanism for the needed planning. Initial questions are: the length of the period that should be covered by the formal plans, the extent to which there should be quantification, the number and kinds of meetings, and the types of reports to be prepared. The decision about these elements is in itself a considered judgment. The effectiveness, then, of the ongoing long-range planning is related directly to the competence of the individuals administering the process and the support given by higher level organizational authority.

In Leisure World formal long-range planning has consisted of a standing committee of the Golden Rain Board which typically includes representatives from the three housing corporations and other
residents who are believed to provide useful contributions. This committee meets monthly. Its role has varied to a considerable extent over the years it has been in operation, depending on the leadership of the particular chairman. Its findings and recommendations have dealt with special issues and have been directed to the Golden Rain Board for consideration and appropriate action. Still open is the possibility that there could be more regular reports, projections, and quantified goals — as, for example, those that might be established for the level of the average age of residents.

A second kind of long-range planning in Leisure World has to do with the five-year plan that covers capital expenditures for buildings, facilities, and related activities. This plan is developed each year as a part of the annual budget process. While the objectives of such a plan are certainly sound, there have been very real problems of fully achieving the potential objectives. At the base of the problem probably is a lack of general agreement as to whether this plan is a shopping list, a definitive commitment for future spending, or, more properly, an expression of best possible current thinking for later reappraisal and modification in the light of changing conditions. When the latter approach is fully understood, this particular long-range program can be a major part of the effort to achieve our Leisure World goals.

**Partnership Approach With The Managing Agent.** The achieving of goals for Leisure World and the related implementation of the many supporting activities and services, from a management point of view, can be provided in a variety of ways — directly by the residents or through any number and any level of subcontractors. At Leisure World the choice has been made to turn to a professional management group, “Professional Community Management” (PCM). That organization is headed by a general manager and presently a staff of vice-presidents, lower level managers, and workers of about a thousand people. PCM is reimbursed for these services through a combination of a fee, direct reimbursement of its expenditures, and some favorable space arrangements for its real estate sales activities. While the policies and capital expenditures are made by the Leisure World resident boards, the PCM organization administers the process by which the board decisions are carried out. Our interest at this point is in the supporting strategy of a partnership approach to maximize the economy and effectiveness of the
work of PCM as it seeks to serve the Leisure World community.

The nature of the problem stems first from the fact that each of the two partners — Leisure World and PCM — is a complex organization. On the Leisure World side we have the four corporate boards and a wide array of committees. On the PCM side we have a management structure of directors, managers, supervisors, and employees. Each of the two partners, therefore, has all the problems of a large organization where management must delegate responsibilities downward and then measure and evaluate performance in terms of results achieved and cost effectiveness. There is also the further complexity of interface between the two organizations at each organizational level — that is PCM managers with committees and subcommittees of each corporate body. And, finally, there is some natural difference in personal goals. Leisure World governance people are interested primarily, of course, in value received, whereas PCM managers must to some extent think in terms of personal self-interest.

The strategy of the partnership approach is, so far as possible, to contain the previously described complexities by more positively asserting the higher level common interests and objectives and then working more systematically to motivate those involved at all organization levels. The gold to be mined is that a motivated person is a substantially more productive producer of whatever he is doing. A motivated employee will take more pride in work done and do that work better and in greater quantity. A motivated manager will look harder for better ways to get things done. He will more often find new ways to use his subordinates more productively. We know that all of this is true, but how do we generate the process? In terms of substance we generate motivation at each managerial level in two major ways: (1) by being motivated ourselves through high level goals and thus demonstrating to the people under us our own dedication, and (2) by seeking always to help subordinates understand the opportunities and the satisfaction that can be achieved by supporting higher level goals. Behind all of this is the necessity of some mechanism that will periodically remind us of the need to evaluate the way we are generating it. Motivation is in the last analysis a basic part of being a good manager, but it is properly viewed here as a special strategy for achieving Leisure World goals.

Aggressive Maintenance and Renovation. The last of the strategies we have suggested for achieving Leisure World goals is a policy of
aggressive maintenance and renovation. We have previously considered the built-in tendency to become used to the level of things around us and thus to fall below the standard held by the visitor and the new observer. It is like becoming increasingly comfortable with an old house, old clothes, and comfortable slippers. In community terms it is the temptation to become excessively tolerant to overgrown trees, faded exteriors of buildings, and soiled and worn interior decoration and facilities. The strategy of aggressive maintenance and renovation is, therefore, to compensate for this very natural and normal factor by a more positive level of boldness in providing funds for current maintenance, replacement of equipment, renovation of facilities, and other types of expenditures that better insure proper standards. As it happens, the celebration of Leisure World’s Silver Anniversary has served to give a new impetus to seeking an extra sparkle to a community that is so richly blessed with the basics of a beautiful setting. There now seems every reason to believe that there will be a better continuing effort to carry on such a policy of aggressive maintenance and renovation.

A Final Word

We began this book by telling about a dream for a new way of retirement living. That dream then led to the birth of Leisure World when the first residents arrived on September 10, 1964. This was the beginning of a twenty-five year span that we are now celebrating. What happened during those first years has been the concern of the nine preceding chapters — both as they pertain to history and in portraying what Leisure World is today. All of this has appropriately served as background for looking ahead to the future — Leisure World’s next quarter century.

In this final chapter our focus was on the identification and clarification of our goals. We evaluated our resources and found them to be superior in terms of climate, facilities, and people. We considered also our environment which is characterized by expanding capabilities and expectations for retirement living. In this dynamic setting we saw the special strengths of Leisure World to be the wide range of options provided for all kinds of things that enrich retirement years. At the same time we saw the major economic capabilities that come with large numbers of residents procuring goods and services on a cooperative basis.
When we looked at our alternatives we concluded that our major objective should be to maintain an active community at the now existing level. We then moved to a consideration of the key strategies by which we might achieve that active retirement community goal. These strategies at the same time identified the types of implementing actions that will be needed for good goal achievement.

Now in our twenty-fifth year Leisure World looks ahead. We know that the future always involves risks. There are, and always will be, emerging factors for which we must be alert and for which we must provide effective responses. We know that we must continue to earn our leadership. But Leisure World has a twenty-five year track record of success. Moreover it is alive and healthy as it celebrates its quarter century anniversary. In its own way, also, this book is a testimony to the vitality of Leisure World to maintain leadership in its field.

In total, Leisure World looks back with pride, and forward with continuing confidence. Leisure World is ready for the next twenty-five years and will continue to provide the means for "Fulfilling Retirement Dreams."
During the writing of this book many questions were directed to Mr. Ross Cortese and his responses — all of which were appropriately utilized — are deeply appreciated. In addition Mr. Cortese prepared a statement which the editors considered so comprehensive that it is included here as an epilog.

Some people have been most kind with words of praise about what I have accomplished in developing the community of Leisure World, and I appreciate the kindness, but in truth, there is much more to the success of Leisure World than what a builder can provide.

I must admit that I am very pleased with what my associates and I planned 25 years ago and with what we were able to construct physically. Our structures are well done, our design and layout of the streets, the club houses, green space and all the physical THINGS of a community are a credit to the architects, designers, engineers and the workers who laid the brick and hammered the nails. It was indeed well done and that is what a builder is supposed to provide.

But Leisure World is much, much more than the physical things that have been placed on this piece of real estate. It is different from any place on earth, and it is this difference that gives me the most joy as I reflect on the past quarter century.

The first thing to do is to express my appreciation to all who have made Leisure World a success. Those who have come here to live embraced this new concept, and with your support, it has flourished, not only here but in other Leisure Worlds across the nation where more than 50,000 now live.

And I want to thank also the Marines and the local government officials for their support. Because we have been able to work together through the normal give and take that is typical in a dynamic developing area, we have created a better life style.

Because of all the support we have had at Leisure World, and because of the successes that have been achieved, we are moving forward with plans that will extend the Leisure World concept to an international scope in a new concept that will open opportunities for Leisure World residents everywhere to participate in this better way of life.

We will renew and increase our interest and support in the School of Gerontology at the University of Southern California, because what we have learned so far is only the beginning.

Leisure World is a reaffirmation of confidence in the noble side of human nature. It is a reaffirmation of faith in the human spirit, of the belief that, given the opportunity, human beings will live peacefully together, will be productive and creative and will seek a level of happiness that improves the environment for all around them.

We have much to learn about this business of growing older in years. We have
much to learn about the physical evolution of the human body, and we have much more to learn about the evolution of the human spirit as the years increase. We have learned much in the years since the Leisure World concept first took shape, and I and all of those who have examined the phenomenon of aging will be eternally grateful to the residents of Leisure World for helping us to learn.

I began pursuing this dream of helping to provide a better life for our older citizens after receiving advice and information from many sources including that of a spiritual nature. We were looking for ways to provide what we could determine were the greatest needs for older people who had achieved their primary financial goals and were ready for a more relaxed lifestyle.

It seemed immediately clear that what was most important for those of advanced years was to have security. They wanted to feel safe from fear of physical harm and from fear of loss of property.

The need for a secure environment for spiritual reassurance was also a major concern, and in Leisure World, the Church was a top priority, and sites for all denominations were provided.

Also they wanted convenience, recreation, and freedom from responsibility for home maintenance. Their days at this point in life were prime time, and they wanted fulfillment at the highest level.

It was not particularly difficult to provide for all of those wishes, and we were particularly blessed with a year-round climate that is ideal for leisure living.

But what we didn’t know is what would become of the people who no longer had to contend with the routine stress of life. How would they react when complacency replaced concern.

I had believed all along that the human spirit would recognize opportunity, and that individuals, to the best of their physical capabilities would channel this new found energy, this energy no longer needed in areas that once demanded attention, into new creativity and productivity.

There were things to do, goals to attain, others to help, causes to champion, and here was a wealth of experience and human energy waiting to be harnessed.

So, as I reflect on the 25 years of Leisure World, my first reaction is to express my gratitude for the people who have come here to live and to create this way of life.

President George Bush has asked for a kinder and gentler nation. We have the ideal model here at Leisure World.

ROSS W. CORTESE
APPENDIX A

LEISURE WORLD CLUBS/ORGANIZATIONS

LAGUNA HILLS ACADEMIANS
AERO-SPACE CLUB OF LEISURE WORLD
ALISO CLUB
AMERICAN ASSOCIATION RETIRED PERSONS (A.A.R.P.)
AMERICAN ASSOCIATION OF UNIVERSITY WOMEN (A.A.U.W.)
AMERICAN IRISH SOCIETY
AMERICAN-ITALIA CLUB
AMERICAN LEGION POST 257
AMERICAN RED CROSS
AMERICAN RED MAGEN DAVID FOR ISRAEL (ARMDI)
AMERICAS, CLUB OF THE
AMIGOS NUEVOS
AQUADETTES
ART ASSOCIATION
ASTRONOMY CLUB
AUDUBON SOCIETY

BADMINTON CLUB OF LEISURE WORLD
BEETHOVEN CHAPTER, O.C.
PERFORMING ARTS CENTER
BIBLE AND FELLOWSHIP
BIBLIOPHILES, THE
BILLIARDS CLUB OF LAGUNA HILLS, WOMEN'S
B'NAI B'RITH MEN'S LODGE #2933
B'NAI B'RITH WOMEN OF LAGUNA #1476
BOCCE CLUB
LEISURE WORLD BOWLERS CLUB
LEISURE WORLD MEN'S BOWLING LEAGUE
LOS AMIGOS BOWLING LEAGUE
LEISURE WORLD HAWAIIAN BOWLING AND TRAVEL CLUB
BRIDGE CLUB, LAGUNA HILLS
BRIDGE CLUB, JOKERS
BRANDEIS UNIVERSITY NATIONAL WOMEN'S COMMITTEE, L. H.
LEISURE WORLD BUS DRIVERS ASSOCIATION OF LAGUNA HILLS
CALIFORNIA CLUB
CAMERA CLUB
CANINE CLUB
CAT CLUB
CERAMIC CASTERS CLUB OF LEISURE WORLD
LEISURE WORLD CHESS CLUB
CHICAGO CLUB
CHINESE BRUSH PAINTING, AMERICAN ARTISTS
OF SHAN HAI
CHINA DOLLS
LEISURE WORLD CHORALE
CITY OF HOPE, ESPERANZA CHAPTER
CITY OF HOPE, PRECIOUS LIFE CHAPTER
CLASSIC GREAT BOOKS
CLUB "30"
LAGUNA HILLS COIN CLUB
COLORADO CLUB
COMMON CAUSE OF LEISURE WORLD
COMMUNITY ASSOCIATION
COMMUNITY CONCERTS
CONCERNED CITIZENS FOR PEACE
CREATIVE CRAFTS
COUNCIL OF CATHOLIC WOMEN

D.A.R. ALISO CANYON CHAPTER
DAKOTA CLUB
DANCE CLUB, AMERICAN BALLROOM
DANCE CLUB, BALLROOM OF LEISURE WORLD
DANCE CLUB, SUNDAY NIGHT BALLROOM
DANCE CLUB, FOLK OF LEISURE WORLD
DANCE CLUB, GLOBE TWIRLERS (SQUARE DANCE)
DANCE CLUB, INTERNATIONAL
DANCE CLUB, ROUNDALIERS
DANCE CLUB, SUNDAY SQUARES
DAUGHTERS OF THE BRITISH EMPIRE
DELTA KAPPA GAMMA SOCIETY
DEMOCRATIC CLUB
LEISURE WORLD DENTISTS RETIRED
DISCUSSION CLUB, MEN'S
DISCUSSION CLUB, SUNDAY
Appendix A

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DOLL COLLECTORS CLUB, OF LEISURE WORLD

LEISURE WORLD EASTERN STAR CLUB
PAST MATRONS CLUB OF THE EASTERN STAR
EASTERN STAR, SADDLEBACK PAST MATRONS & PATRONS
THE EBELL OF LAGUNA HILLS
LEISURE WORLD ELECTRONICS AND COMPUTER CLUB

LEISURE WORLD FESTIVAL ASSOCIATION
LEISURE WORLD FILM CLUB
THE FINANCIAL CLUB OF LEISURE WORLD
FOREIGN POLICY CLUB
FOREST HOME WOMEN’S AUXILIARY OF LAGUNA HILLS
THE FORUM OF LEISURE WORLD
THE EVENING FORUM TWO INC.
FUNDALA PERFORMERS CLUB
FOREIGN POLICY ASSOCIATION OF LEISURE WORLD

GARDEN CLUB OF LEISURE WORLD
WESTERN AMERICAN GOLF ASSOCIATION
LAGUNA HILLS MEN’S GOLF CLUB
LAGUNA HILLS WOMEN’S 9-HOLE GOLF CLUB
LAGUNA HILLS WOMEN’S 18 HOLE GOLF CLUB
GRAY PANTHERS
THE GREAT LAKES CLUB

HOME ECONOMICS CLUB OF LEISURE WORLD
HADASSAH
HARMONAIRES
NATIONAL HEALTH FEDERATION/NUTRITION CLUB
HEARING IMPAIRED CLUB
LAGUNA HILLS HIGH TWELVE CLUB
LEISURE WORLD HIKERS
HUNGARIAN CLUB
LEISURE WORLD HISTORICAL SOCIETY

LEISURE WORLD JEWELRY
AND ENAMELING ARTS CLUB
JEWISH FEDERATION OF ORANGE COUNTY, L.W./L.H.
JEWISH HOME FOR THE AGING, HERITAGE HOME,
    L.W. CHAPTER
LEISURE WORLD JOLLY BOYS CLUB

KAPPA ALPHA THETA
KEYBOARD CONCERT CLUB
LAGUNA HILLS KIWANIS CLUB
KIWANIS, MOULTON CLUB
KIWANIS, SADDLEBACK
KNIT WITS
KOOL KATS

LADY LIONS OF LAGUNA HILLS
LAGUNA HILLS LAWN BOWLING
LAGUNA HILLS LIONS CLUB
LEAGUE OF WOMEN VOTERS

MASONIC AUXILIARY
MELODY MEN
MEDICAL SOCIETY OF LEISURE WORLD
MEN'S SOCIAL CLUB
UNIVERSITY OF MICHIGAN ALUMNI
MILITARY ORDER OF WORLD WARS
MINNESOTA CLUB

NA'AMAT-USA
NATIONAL ASSOCIATION RETIRED
    FEDERAL EMPLOYEES
NIFTY FIFTIES CLUB
NEW YORK CLUB

O.R.T. WOMEN'S AMERICAN
ONE TEN CLUB
OPERA 100
LEISURE WORLD ORCHESTRA
OREGON STATE CLUB, MONTANA, IDAHO

P.E.O. GROUP
PAN LESSON CLUB
PANHELLENIC ASSOCIATIONN OF LAGUNA HILLS
PARAPSYCHOLOGY CLUB OF LEISURE WORLD
THE LEISURE WORLD PARKINSON GROUP
PETROLEUM CLUB
PHI BETA
GREATER PHILADELPHIA CLUB
LAGUNA HILLS PHILHARMONIC COMMITTEE
PHYSICAL FITNESS CLUB
PINOCCHLE CLUB
POMEGRANATE GUILD OF JUDAIC NEEDLEWORK
THE PORCELAIN CLUB OF LEISURE WORLD
POTTERS AND SCULPTORS CLUB
PRESIDENTS COUNCIL
PRITIKIN SUPPORT GROUP

R.V. CLUB, LEISURE WORLD
AMATEUR RADIO CLUB
REPUBLICAN CLUB
LAGUNA HILLS REPUBLICAN WOMEN'S CLUB
LEISURE WORLD RETIRED
SCHOOL EMPLOYEES ASSOCIATION
ROCK AND GEM CLUB
ROD AND GUN CLUB

SADDLEBACK COMMUNITY HOSPITAL
THrift SHOP
SCH GIFT SHOP
SADDLE CLUB
SADDLEBACK COMMUNITY HOSPITAL VOLUNTEERS
SALVATION ARMY
SCANDINAVIAN CLUB OF LEISURE WORLD
SADDLEBACK VALLEY SCOTTISH RITE ASSOCIATION
SCRABBLE CLUB
SECURITY OFFICERS CLUB
LEISURE WORLD SHRINE CLUB
SHUFFLEBOARD ASSOCIATION
SINGERS, CONTINENTAL
SOPHISTICATED CLUB OF LEISURE WORLD, LAGUNA HILLS
STAMP CLUB

TABLE TENNIS CLUB
TEMPLE JUDEA SINGLES GROUP
TENNIS CLUB
THEATRE GUILD OF LEISURE WORLD, INC.
TOPS P.M. (Take Off Pounds Sensibly)
TRAVEL CLUB I
TRAVEL CLUB II
TRIPLE “C” CLUB (Checkers And Cribbage)
TOASTMASTERS CLUB

UKULELE AND GUITAR CLUB
LEISURE WORLD UNITY CENTERS (Religious Group)

VISUALLY IMPAIRED CLUB

WAPITI CLUB
WASHINGTON CLUB
WISCONSIN CLUB
WOMAN’S CLUB
WOMEN’S OVERSEAS SERVICE LEAGUE
WRITERS AND PUBLISHERS CLUB OF LAGUNA HILLS
APPENDIX B

PRESIDENTS OF MUTUAL BOARDS AND THE GOLDEN RAIN FOUNDATION

It is only proper that the residents of Leisure World who have served as Presidents of the various Mutual Boards of Directors and of the Golden Rain Foundation Board of Directors be recognized for their outstanding contribution to the governance and welfare of the entire community.

Mention should be made also of those hundreds of persons who served as members of the many Boards of Directors and on committees but the list would be far too long to publish. All of Leisure World is grateful for the time and effort given by so many in order that the "Retirement Dream" be realized.

The following list of Presidents is in alphabetical order with the organization and term of office given for each person.

<table>
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<tr>
<th>Elected President</th>
<th>Corporation</th>
<th>Term Served</th>
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<tr>
<td>M. Glen Adams</td>
<td>Mut. #65</td>
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<td>Warren Ashleigh</td>
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<td>Granville Black</td>
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<td>Leon A. Bosch</td>
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<td>Randall Boyd</td>
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<td>Ches E. Braly</td>
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<td>Rodney R. Burns</td>
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<td>Evelyn Davis</td>
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<td>Frank Donovan</td>
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<td>Park B. Dowd</td>
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<td>Harry Grossman</td>
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### Elected President

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<th>Name</th>
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## Appendix B

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<td>W. Laurence Smith</td>
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<td>Sec. Lag.</td>
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<td>Floyd Stebbins</td>
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<td>Dr. Tracy E. Strevey</td>
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<td>R. Phil Studebaker</td>
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<td>Dr. John Sundbye</td>
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<td>Ernest O. Thedinga</td>
<td>Mut. #37</td>
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<td>Daniel T. Thomas</td>
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<td>George Throssell</td>
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<td>John F. Toner</td>
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<td>John A. Tongue</td>
<td>Mut. #19</td>
<td>1968, 1969</td>
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<td>William R. Tucker</td>
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<td>Nick T. Ugrin</td>
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<td>Merwin H. Waterman</td>
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<td>Dana M. Weaver</td>
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<td>J.B. Werner</td>
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<td>Glen F. Wineman</td>
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<td>Walter C. Winkler</td>
<td>Mut. #35</td>
<td>1974</td>
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<td>Herbert Wolfram</td>
<td>Mut. #74</td>
<td>1978</td>
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<td>Douglas P. Wood</td>
<td>Third Lag.</td>
<td>1989</td>
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</table>
Celebration of the 25th Anniversary began with (what else?) — a parade! Led by Third Marine Air Wing Band (top), nearly 100 groups joined in the festivities (center and left) while residents lined the streets and happily cheered. (right)
Beginning in January, 1976, the Rossmoor Corporation established the Leisure Worlder of the Month program to honor outstanding residents for their contributions to the quality of life found in Leisure World. From the day of the first “move ins” it was obvious that arriving residents brought with them vast reservoirs of talent, experience and professional competence in many diverse fields of activity. This in turn was translated into contributions to the life style of Leisure World.

From 1976 to 1981 the monthly ceremony was held in the Rossmoor Sales Building on Carlota Avenue and involved presenting a portrait to the honorees along with a framed citation. When Rossmoor began to retire from its relations with Leisure World, the program was deemed so important that the Leisure World Historical Society took it over in 1981 and with the financial sponsorship of Home Federal Savings and Loan Association it has continued. The monthly ceremony is now held in Clubhouse 6 and is recognized as a most important event in the life of Leisure World.

1976

January: Eugene Gilbert  
February: Jane Simon  
March: Lawrence Lew  
April: Jerome Lederer  
May: Adm. Roland Smoot  
June: Olive Gilliam  
July: (Ceremony Omitted)  
August: Arthur Beaumont  
September: Helen K. Loring  
October: Ernest J. Billman  
November: Sylvester Hall  
December: Elaine Levy

1977

January: Herbert E. Morey  
February: Harry C. Westover  
March: Albert Hanson  
April: Diane Edwards  
May: (Ceremony Omitted)  
June: John H. Awtry  
July: Warren Morgan  
August: Lydia G. Deane  
September: James Sterner  
October: Newell Parker  
November: Elsie Parker  
December: Richard T. Turner
1978

January  Arthur Pancook
February  Mary Cornelius
March     Frank J. Schaeffer
April     Leota Peterson
May       Harold Kime
June      Dr. Tracy E. Strevey

July      Robert C. Nemann
August    Paul Zimmerman
September Leig Lukaweicki
October   M.H. (Jim) Waterman
November  Olive Leonard
December  Dr. Lee A. DuBridge

1979

January  Catherine Wright
February  George Bouchard
March     Wesley Fesler
April     Glenn & Lenore Giddings
May       Ward Darley
June      Marjorie Jones

July      Dr. John Fernald
August    Viola Sanders
September Ernest O. Thedinga
October   Elizabeth M. Pedrotti
November  Wilson Kline
December  Minna Liebman

1980

January  Thomas E. Hines
February  Frances Neeland
March     Henry LeFebvre
April     Marjorie Hartmann
May       Ferdinand A. Hall
June      Frank LaClave

July      Hildegard Wylde
August    J. Edward Berk, M.D.
September Leonard S. Jones
October   Alfred H. Driscoll
November  Robert P. Bryson
December  Dorothy Colver

1981

January  Wayne Tiss
February  Nina Craft Johnson
March     James L. Pursell
April     Adele Siipola
May       John A. Sickenberger
June      Glenn F. Wineman

July      Charles W. "Dinty" Moore
August    Frederick W. Schafer
September Sarah Lederer
October   Joe H. Brock
November  Mary Drane
December  Leon A. Bosch

1982

January  George A. Rowley
February  Dorothy Novatney
March     William E. Grundke
April     Violet Royer
May       John W. Luring
June      Irma Franklin

July      Robert L. Price
August    Park B. Dowd
September Howard E. Moore
October   Marian L. Fox
November  John Morley
December  Marjorie Bregar
### Appendix C

#### 1983

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<th>Month</th>
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<td>Wallace T. Filson</td>
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<td>Stanley J. Leland M.D.</td>
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<td>Louise D. Reno</td>
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<td>Alice &amp; Jim White</td>
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<td>Matilda Jane Kemna</td>
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<td>Vern Alm</td>
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<td>Albert Hally</td>
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<td>Thomas J.O’Conner</td>
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<td>August</td>
<td>Mina S. Cunliff</td>
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<td>Betty Moore</td>
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<td>Gilbert Nelson</td>
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<td>David B. Mitchell</td>
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<td>Arthur Briggs</td>
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<td>Rissa Intha Coates</td>
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<td>Len Lescher</td>
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<td>Ross Appleman</td>
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<td>Fay &amp; Richard Bruner</td>
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#### 1986

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