

SADDLE CREEK PRIVACY GATE RULES Operations



SADDLE CREEK

**SADDLE CREEK COMMUNITY SERVICES DISTRICT
COPPEROPOLIS, CALIFORNIA**

These orders are to be read and understood by all privacy officers assigned to Saddle Creek. They will be periodically reviewed and updated. All privacy officers will acknowledge the reading and understanding of these orders in the job knowledge roster.

OVERVIEW OF THE FACILITY

The following are to be carefully read by each privacy officer assigned to this job-site. They should be read during your on-the-job training or by the completion of your first assigned shift. You should, on occasion, read through the instructions again. Refer back to them to familiarize yourself with important sections and resolve any questions you may have. In order to fully understand these instructions, it may be necessary for you to read them a number of times. If any tasks outlined in these instructions are not clear, ask for help from your supervisor or scheduler. If necessary, contact MC&I Investigations at (209)-785-1757.

Periodically, these instructions will be revised and updated. You should be alert to any such changes that affect the requirements of your job. You will also find a "memo book and pass down log". These will contain information not found anywhere else. In addition, make sure other officers (that you relieve and officers that relieve you) are aware of these changes as well.

Sincerely,

Saddle Creek Community Services District Board

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**HOURS OF COVERAGE
AT
SADDLE CREEK**

MANNED SCHEDULE IS AS FOLLOWS:

Monday through Friday:

Shift Hours 1700 hours to 2300 hours

Saturday and Sunday:

Shift Hours 1000 hours to 2300 hours

GATES ARE CLOSED PER THE FOLLOWING SCHEDULE:

Monday through Friday:

Gate Hours 1700 hours to 0600 hours

Saturday and Sunday:

Gate Hours 1000 hours to 0600 hours

DESCRIPTION OF FACILITY

SADDLE CREEK is an upscale planned development made up of single-family homes and several rental bungalows. In addition to owners, renters also occupy some of the residences. All of the residences within this community access their homes by coming through the gate off Little John Road.

The PRIVACY FORCE takes its direction from the Saddle Creek Community Service District Board (hereinafter "CSD"). They may issue changes in site instructions directly to the privacy force, or through MC&I Investigations Supervisor. The privacy force is not to accept changes in site instructions from other than these persons.

The Calaveras County Sheriff's Department provides police services and the Copperopolis Fire Protection District provides fire and medical aid.

Calaveras County Sheriff's (non-emergency)	209-754-6500
Copperopolis Fire Protection (non-emergency)	209-785-2393
ALL POLICE, FIRE, AND MEDICAL EMERGENCIES	911

PURPOSE OF COVERAGE

The Privacy Officers are responsible for access control to Saddle Creek. In this capacity, the officers provide public relations and an atmosphere of privacy for the residents.

Privacy Officers will permit entrance to Saddle Creek on the basis of the instructions that will be explained in detail in pages to follow. It is important these instructions be followed completely. An incident that occurs in Saddle Creek that involves an unauthorized person admitted by the Privacy Officer can have serious complications.

PUBLIC RELATIONS

The atmosphere of privacy at Saddle Creek must be one of courteous control. Residents, visitors and guests must be welcomed with a "Good Evening", etc.; and a "May I help you?" Telephone calls will also be answered with "Good Afternoon" / "Good Evening", etc.; and a very polite "Saddle Creek Privacy, May I help you?"

Be visible to traffic approaching the visitor's gate. When a vehicle approaches, be standing by the door so the driver can see you and you can see the driver and vehicle occupants. DO NOT remain sitting in the gatehouse and just wave people through. Greet each visitor as a professional. The manner in which each officer represents themselves to all people reflects upon the entire privacy force, Saddle Creek community, and the CSD. Retain a friendly but business like attitude at all times.

Additional public relations needs are to:

- Learn to recognize residents and where they live.
- Learn the names and locations of streets, buildings, facilities, and other pertinent information.
- Be sure to project a positive image; present yourself displaying the proper demeanor and dress.

PERSONAL APPEARANCE

The CSD requires personal appearance standards for the privacy patrol personnel.

Each officer is expected to look as sharp as possible at all times. Visitors, guests, and residents will view you each day so no breaches of appearance standards are acceptable.

The authorized uniform and appearance policy for Saddle Creek Privacy Officers is as follows:

The authorized uniform description (when instituted) will be listed in Attachment A. All parts of the clothing worn will be cleaned, pressed, and shoes shined clean at all times.

Male officers will be neatly groomed, hair must be clean and neatly groomed and may not exceed below the top of the shirt collar. Mustaches and beards will be neatly trimmed and not extend below the corners of the mouth.

Preferably female officers hair should be shoulder length or shorter and neatly groomed. Longer hair needs to be worn in such a fashion as to not fall below the collar.

REPORTING IN FOR DUTY

The officers are to park their cars in the parking area by the gatehouse or the designated parking area. Do not park around the entrance/exit area. This is the only location you are to park your vehicle. Walk to the gatehouse to relieve the on duty officer and assume responsibility of the post. Please arrive on time.

Information must be relayed by the off-going officer concerning particular problems or special instructions from the MC&I or the CSD. This information is kept in log form and may originate from CSD Management, MC&I Investigation, or the residents. At the beginning of each shift you are expected to read "Memo Book" and "Pass Down Log". Much of the information deals with recent changes in gate access restrictions.

REPORTING OFF DUTY

When the relief officer arrives, the off-going officer will thoroughly brief the on-coming officer of all problem areas or special instructions, including all pass down messages. When this has been accomplished, the off-going officer will depart the gatehouse, proceed directly to his/her vehicle and depart Saddle Creek community. DO NOT delay your departure by discussing personal business.

Remember, each off-going officer has the responsibility to leave the gatehouse clean and orderly. THIS WILL BE AN ITEM OF INSPECTION AT LEAST ONCE PER WEEK BY THE SADDLE CREEK SITE MANAGER!

GREETING

Greet people courteously and in a friendly manner. Create a welcome atmosphere whether a person must be turned away or not. A greeting such as "Good Morning, may I help you?" immediately sets the visitor at ease and places the privacy officer in a position to control the situation. DO NOT IGNORE RESIDENTS USING THEIR OWN GATE! A friendly wave and a friendly greeting will make the resident feel recognized and will go a long way toward promoting the image of the privacy force at Saddle Creek.

GENERAL DUTIES

1. The gatehouse is the responsibility of the Privacy Officer on duty. If someone in the gatehouse vicinity is hurt, either through vehicular reasons or their own actions, the officer could be subject to a negligence suit. Therefore, keep children and young adults away from the gate area.
2. Visitors are not permitted in the gatehouse. Only the Privacy Officer, MC&I supervisory personnel, a pre-approved client contractor, or CSD personnel are allowed inside. The Privacy Officer is not permitted to use the phone to make calls for anyone. If the manager is called for a specific problem and requests to speak with the person attempting to gain entry, hand the phone to the visitor through the window of their car, but do not let the person inside the gatehouse. Keep the door locked.
3. Learn to back off from confrontations. If you are having problems with a person call MC&I Investigations at (209)-785-1757 immediately. Have as much information regarding the incident as possible ready to relay. Remember, the client/guest has put in a full day so use your best judgment before calling the client. These calls should only be made if the visitor is adamant about gaining access and the next step would be calling the sheriff to have the person removed.
4. Do not allow vehicle parking around the entrance / exit area (including your own vehicle). If they are an authorized visitor, have them park in the parking spaces provided by the gatehouse.
5. When on a rest room break, keep the gates closed. Place the sign where it can be seen from the visitor's lane. Keep the break as short as possible. Remember, you are paid for your full shift so always keep breaks short and try to schedule them when activity / traffic at the gate is during a slow period.
6. NEVER sit back in the chair and put your feet up on the desk. Nothing is more unprofessional than the appearance of a privacy officer in this position.
7. Remove all trash at the end of your shift.

GATE OPERATION

Entrance Gate: There are two separate vehicle lanes for entry at the gate. The far lane from the gatehouse is specifically for residents within Saddle Creek. The occupant of the vehicle controls the gate by operating his/her gate transmitter (gate opener) that the resident has obtained from the CSD. Although there is a manual control-for this gate located inside the gatehouse, the officer except when fire/police vehicles are responding to an emergency will not use it and this gate must opened to allow entrance of these large vehicles. Remember, the residents control their own gate.

Residents using the far gate may have to be reminded that only one car at a time can pass through the gate. Visitors following a resident into the community must use the visitor gate. The lane nearest the gate house is for visitors and for residents who have not yet been issued their control device/transmitter, it is inoperable, or have left it in another vehicle. **THE PRIVACY OFFICER OPERATES THIS GATE.**

Once the visitor has been approved for entry (covered elsewhere in these instructions), the officer will activate the gate and wave the visitor through. **DO NOT OPEN THE VISITOR GATE IF THERE IS A VEHICLE IN THE RESIDENT LANE**

Explain to the visitor that this delay is for the safety of both parties. The gate will then open after the resident vehicle has cleared the gate area. If there is another vehicle waiting in line or approaching, please indicate they should not proceed by holding out your hand in a stopping motion. This will prevent the car from proceeding far enough forward to activate the gate as it is coming back. Never open the gate if a resident is approaching the resident gate.

RESIDENT ACCESS

All residents of Saddle Creek should have a transmitter. If they do not have a transmitter and after verifying that the person is a resident, suggest they obtain one from the sales office.

Entry is authorized by their use of the resident lane and using their transmitter to operate the gate. Authorized residents may obtain a gate control device from the sales office (Linda Stephanick) or Greg Heberd, CSD Site Manager. If a vehicle approaches the gate in the resident lane and the gate opens up, no action other than a friendly greeting is necessary.

Those residents who have not received a gate transmitter must enter using the visitor's lane. The resident must give his name, address and phone number. Punch it up on the computer to see if the information matches. If all information is correct, wave the person through. If only the name is correct, or the address is correct, or the address is correct but not the telephone number, ASK TO SEE THEIR DRIVER'S LICENSE. If this properly identifies them as the same person on the computer, allow access. If it doesn't you'll have to treat them as a visitor, but do so in a very courteous, friendly manner. See visitor's instructions further on.

Some residents may have notified the privacy officer of former residents not to be admitted such as ex-spouses. Officers MUST be aware of these notices and be able to deny entrance even though they know the correct computer data and have driver's license with correct name, address, etc.

Please Note: These admission rules for residents may seem a little strict for someone without a gate control device. But remember, this is the exception. Also, it is relatively easy to obtain this data without being a resident. This is important. The client would rather receive complaints about us being too strict rather than allowing just anyone in on the pretense of being a resident.

YOUR PRIMARY JOB IS ACCESS CONTROL AND ENSURING RESIDENT'S PRIVACY. DO NOT LET ANYONE IN WHO SAYS THEY ARE A RESIDENT.

Transmitters: Each resident is entitled to have 4 transmitters programmed at no cost. The CSD will provide the first transmitter at no cost; the resident must supply or purchase from the CSD any additional transmitters. All transmitters, in excess of 4, will require a \$25.00 programming fee. Transmitters will be programmed by Greg Heberd, CSD Site Manager, by appointment only. Contact him at 209-768-5678 to schedule an appointment.

PERSONS VISITING A RESIDENT

At any time, night or day, a visitor (other than a process server, see separate instructions), may be admitted to visit a resident home as long as the conditions below are met.

NOTE: This does not apply if the resident has left WRITTEN AND SIGNED notice of a specific procedure to be followed. Always comply with those special, individual instructions.

The same procedure must be followed at any time of day. While there may be some delay at busy visitor times, carefully follow these procedures and work as quickly as possible.

Ask the visitor in a courteous and friendly manner if you can help them. When they indicate the name of the person they wish to visit, punch it up on the computer screen. If the resident has an allowed visitors list, ask for the visitor's name. If listed and approved let them in, if they are not in the computer listing or the approved list, assist the visitor in using the entry call box, and if necessary call the resident and obtain permission to allow entry.

If the entry call box is used or you call the resident and the number is busy, wait a minute or so and try again. If still busy and traffic is backing up ask the visitor to make a U-turn and stop next to the exit curb out of the way. **BE SURE YOU HAVE VEHICLE INFORMATION FIRST.** Continue to try and reach the resident. If you are unable to contact the resident in a reasonable period of time, inform the visitor you cannot allow entry and for them to try later. You may suggest that they go to another phone and contact the person they wish to see and make arrangements for access. The same procedure applies if you reach an answering machine or voice mail.

If permission to visit is denied, inform the visitor they cannot be allowed in. Then fill out an Incident Report.

Direct the visitor to make a U-turn and exit the property. This is to be done in a courteous manner. Do not degrade the person in any manner because they have been denied entry. If they do not exit as directed, call the resident to warn them that an unauthorized guest is en-route. Call Calaveras Sheriff's Department at 209-754-6500 to report a trespasser. Record the incident in your-Daily Security Officer's Report Daily Security Officer's Report (DSOR).

For service persons such as landscapers, house cleaners, pool cleaners, etc., refer to the appropriate section.

POWER FAILURE

When a power failure occurs the gates will not operate automatically. Follow the following procedures to provide access to Saddle Creek:

1. Block off the resident's lane with cones (cones are located inside the gate house) directing all traffic to the visitor's lane.
2. Remove all gate arms using wrench located in gatehouse.
3. Use the resident's list book for looking up residents. This list is maintained in alphabetical order by last name and will provide their guest list and phone numbers.
4. Watch for the vehicle patrol unit and wave them into the gatehouse area; you will not have radio contact when the power is down. Notify MC& I Investigation and Saddle Creek Community Services District Site Manager (Greg Hebard), 209-768-5678 as soon as possible.
5. Assume a highly visible position, i.e. standing outside the gatehouse to prevent use of the exit lanes to enter.
6. When the power comes on, remove the cones from the resident lane. Replace the arms and turn the power on at each of the gate control boxes. Notify Saddle Creek Community Services District Site Manager (Greg Hebard) and MC&I Supervisor by telephone. Saddle Creek Community Services District Site Manager Cell Phone 209-768-5678, MC&I Investigations 209-785-1757.

EMERGENCY CALLS AND COMPLAINTS

If the Privacy Officer receives a call from a resident concerning emergencies or complaints the following procedure will be used:

Burglaries, fires, or medical emergencies.

- Ask the homeowner to call 911, as this will be much faster than the gate getting all the information necessary to do it for them. If there really is an emergency we cannot waste this valuable time. IF the person is totally hysterical TRY to determine the address and then dial 911 yourself.
- The officer is not to leave the gate to respond to emergencies or complaints. You are to stay at the gate to direct responding fire, police or medical services, etc.

EMERGENCY SERVICES AND NEWS SERVICES

POLICE, FIRE EQUIPMENT, AMBULANCES, etc., must be admitted without delay whether they have emergency lights or not.

If emergency services are approaching, the officer should make every effort to clear a way for them to include opening both gates and keeping them locked in the open position until the emergency vehicles have entered. After all emergency equipment has entered, record in the Pass Down Log Book the agency and direction they took. Notify the CSD Site Manager (Greg Hebard) 768-5678. Complete an IR with as much detailed information as possible.

NEWS SERVICES, (RADIO, TELEVISION, REPORTERS) will not be admitted at any time, unless authorized by a resident, Castle & Cooke, the Site Manager or the CSD Board.

EMPLOYEES OF CASTLE & COOKE

Employees of Castle & Cooke may be admitted if they are on the employee list. If someone claims to be an employee and is not on the list please contact Saddle Creek Development or the General Manager to verify employment.

GOLF COURSE ACCESS

The golf course is a SEMI-PRIVATE course that is not connected with Saddle Creek Community Service District. If someone is looking for the golf course direct them to the Pro-shop.

The golf course is open daily from 0700 hours until dusk.

PACKAGE / PARCEL DELIVERIES

The Privacy Officers are not to accept parcels or deliveries of any sort for residents. Also, they are not to accept keys from the residents for passing on to expected visitors, deliverymen, etc. These acts expose the officer to extremely serious legal liabilities that, at the least, will cause the officer the loss of his job.

FOOT TRAFFIC

Not all unauthorized visitors will attempt to drive a vehicle onto the property. When pedestrians and people on bicycles try to gain access, identify them also. The only difference is their mode of transportation in trying to gain entrance to use facilities such as the tennis courts and pool. These facilities are for residents and authorized guests only!

PROCESS SERVERS ACCESS

The procedure for all process servers, whether uniformed police officer or private servers, once they have identified their purpose of entry, must be as follows:

Obtain some valid identification and record the server's name and ID information (officer's badge number or a driver's license number and state of issue)

Ask to see the papers to be served by having the server hold them in front of you (do NOT take them in your hands) in order to verify it is the server's reason for entry. Record the name and address of the resident to be served. Record the server's vehicle license number and time entry is allowed in the Days Log.

Let the server enter. Then call the resident to notify them that a "visitor" has been allowed access. If the resident questions the identity or purpose of the visitor, inform them that we are legally required to permit process servers to enter.

If the process server drop serves the privacy officer, contact your supervisor immediately and write an Incident Report. If possible, ask the process server for their driver's license number and if this is not possible, please document the license number of the vehicle.

MOVING VANS

When a moving van arrives, verify name and address of owner moving in or out. NO EXCEPTIONS. Be prepared to assist driver and/or new resident with access since they will be unfamiliar with community procedures.

In the case of new resident, give them a gate information sheet to complete and return to help get them started.

REALTORS AND PROSPECTIVE BUYERS

All prospective buyers should be directed to the Sales Office. There are sales models at Saddle Creek. The Sales Office will determine the hours of operation. All perspective buyers should be directed to the Sales Office for access.

Prospective residents accompanied by a Realtor may be admitted to see a home for sale.

REALTORS: Ask to see their business card or the laminated card that shows that they are a Realtor.

APPRAISERS: Ask to see either their business card or the papers for the appraisal they are scheduled to perform.

BUNGALOW RENTERS

All Bungalow renters should be directed to the Bungalow rental desk at the Lodge.

SOLICITORS

The rules for solicitors, even if they are residents, are very simple, **THEY ARE NOT ALLOWED!** If someone indicates they are visiting a specific resident and the resident allows entry, that's OK. But for purposes of general sales, **NO!**

Organizations such as American Cancer Society, Salvation Army, St. Vincent De Paul Society, etc. fall into the category of solicitors unless they are going to be a specific home with homeowner approval.

If a solicitor attempts entry, record the person's name, company, agency, or product they intended to solicit for in the community.

ACCESS OF SERVICE PERSONS

Whenever a service person indicates they have been called to a residence or the golf course, lodge, fitness center or bungalows, they must be in the computer or on the resident's entry list or the resident must be called. This includes persons such as house cleaners, yard maintenance, plumbers, carpet installers, pool cleaners, etc. If they are not in the computer or on the approved entry list and no contact is made, they don't get in!

REPORTS

Each officer is to keep a complete record of his or her shift activities in the Daily Security Officer's Report (DSOR). Indicate briefly but completely all activity during the shift.

Incident Reports (IR) must be completed for anything that occurred during the shift that required special attention; complaints, emergencies, disturbances, etc. These reports may be necessary items of reference in the future if legal action occurs, so be sure the report is thoroughly detailed.

Visitor Logs must be completed as per instructions.

All original copies of reports and visitor logs are to be kept separately and will be placed in the manager's in box and given to the manager. This is especially important for any and all IR's.

GATE INFORMATION SHEET

Officers will maintain a supply of gate information sheets to be given to residents who request them for additions or deletions of their guest list. A sample of this form is shown on the following page. All gate information sheets are to be filled out by the resident. Do not fill out the forms for the resident or accept verbal authorization to do so. The information sheets are our verification that the resident actually authorized the listed individuals and firms.

There are 10 spaces on this form to list children and provide space for a permanent guest list. This information should be updated periodically.

1. Residents may have a "MUST CALL FOR ANY GUEST TO BE ADMITTED" instruction or a "SPECIFIC GUEST LIST". A permanent "ADMIT ALL" is not allowed.
2. For guest clearance longer than seven (7) days the resident must either add the guest to their permanent guest list or call down each week to readmit them. If the time limit has expired then the guest is denied access-unless you can get clearance by calling the resident or the resident calls you.
3. There may be occasions where a resident is having a party. If the number of guests is no more than five, the resident may call the gate and give you the individual names. These would be admitted for that day/weekend only! If the list of guests exceeds five, remind the resident they will have to provide a written guest list. **NO EXCEPTIONS!**

GATE INFORMATION SHEET

TO: THE RESIDENTS OF SADDLE CREEK COMMUNITY SERVICES DISTRICT

FROM: Saddle Creek CSD Board

Below please find an information sheet for the entry gate. We are requesting that you fill out and drop it off at the guard gate as soon as possible, as we would like to get the records updated and complete. Thank you for your cooperation.

SADDLE CREEK COMMUNITY SERVICES DISTRICT RESIDENT INFORMATION AND AUTHORIZED GUEST LIST DATA

RESIDENT'S NAMES: (Last name, First name)

LOCAL ADDRESS:

HOME PHONE:

WORK PHONE:

OTHER PHONE:

CHILDREN AND AUTHORIZED GUESTS

- | | |
|----|-----|
| 1. | 6. |
| 2. | 7. |
| 3. | 8. |
| 4. | 9. |
| 5. | 10. |

OWNER'S NAME (IF DIFFERENT):

DAY/WEEKEND ONLY GUESTS:

You may call the gate at 785-8700 with a maximum of five guests that you are expecting. These five guests would only be good for entry on the day/weekend and would not be on the permanent guest list. If you have more than five guests, you must either give the guards a written list.

NO EXCEPTIONS: NAME/ADDRESS OF NEIGHBOR WHO HAS ACCESS TO YOUR HOME IN CASE OF EMERGENCY:

EXHIBIT A

[blank]

EXHIBIT B

Transmitters will be programmed by Greg Heberd, CSD Site Manager, by appointment only. Contact him at 209-768-5678 to schedule an appointment.