

The *hotline*

Report from the Annual Meeting

GREETINGS TO ALL: As I reflect on our Annual Meeting this past October, I am grateful that hurricane Sandy left only minor damage in our state. We were disappointed that Steve Maag was grounded and unable to make our meeting. Wellness directors Ellen Sims, Wendy Heizman, and Rhonda Stack were able to extend their presentation "Exercise Can Be Fun" for a few more minutes. I hope that wellness directors across the state will take notice of this valuable program.

Tom Akins came to bat and presented an interesting program dealing with what CCRCs must consider as we head down the road and invite Baby Boomers to become part of our communities. Walt Boyer, our Treasurer, presented a program of information concerning CCRC financial status. The challenge is to come up with concepts and recommendations on safety, integrity of residents' entrance fees and, in addition, to review all strategies concerning CCRCs. Walt also gave a little history about our organization using a Power Point presentation for recruiting that he had developed.

After lunch, we received financial reports detailing this past year's activities and also a suggested budget for the coming year. Both reports outlined our shortfall in revenues and, in order to balance the new budget, publication of the *Hotline* will be reduced to two issues per year. The *Hotline* is most important



Above, Wellness directors Ellen Sims, Rhonda Stack, and Wendy Heizman. Below, Tom Akins addresses the audience. Photos by Herald Hughes.



Above and facing page, top, the audience relaxes between presentations. Facing page, bottom, Past President Bill Pearce (right), swears in the new officers (left to right), Treasurer Walton Boyer, Vice President Clint Willis, President Willie Johnson, Secretary Nancy Darter. Photos by Herald Hughes.

to our membership and, with Sandra Lovegrove retiring; a study is under way to come up with a solution. Suggestions to Clint Willis are in order.

The change of name from CCCR of NC to North Carolina Continuing Care Residents Association, "NCCCRA," invited some discussion concerning the cost involved; however, the cost was found to be minimal. A discussion to table the name change was defeated.

The Nominating Committee presented its slate of officers for the coming year. Willie Johnson was elected President, Clint Willis was elected Vice-President, and Nancy Darter was elected Secretary. Walt Boyer was reelected as Treasurer. Bill Pearce, our Past President, conducted the swearing in of the elected officers.

Before adjournment I thanked all 175 folks who attended and gave the President's Report. A motion was made and approved to present to Harry Groves a resolution outlining his many years of dedicated service. We also presented a plaque for Sandra Lovegrove thanking her also for her dedicated service. This was a most enjoyable meeting and we all look forward to a new year as our Association works to make living in a CCRC everything it should be.

Clint Willis
Vice President

Note added: Due to an unexpected injury, Willie Johnson has since had to resign as President.



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## Plans for the Regions' Annual Meetings

SINCE, for the first time, there will not be another issue of the *Hotline* before the Regions' meetings, some of them have not yet had enough time to prepare complete information. What is available appears below, in the order in which the meetings will occur.

### Western Region

THE WESTERN REGION will gather for its 2013 annual meeting at Aldersgate Continuing Care Retirement Community in Charlotte on Tuesday, April 9. Registration begins at 9:25 AM and the meeting begins at 10:00 AM.

Walton Boyer, treasurer of NCCCRA, will give a presentation about what NCCCRA is

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ANNUAL MEETING OF THE WESTERN REGION  
Aldersgate Continuing Care Retirement Community  
April 9, 2013

Registration Form — You must use this form to register — Please print

NAME/NAMES \_\_\_\_\_

COMMUNITY \_\_\_\_\_

ADDRESS \_\_\_\_\_

PHONE \_\_\_\_\_ E-MAIL \_\_\_\_\_

I would like to tour Aldersgate. Yes \_\_\_ (9 AM–10 AM \_\_\_) (After business meeting \_\_\_)

I (we) have the following dietary restrictions \_\_\_\_\_

***COST: \$12 with lunch if received by March 29 (\$2 without lunch)***

***\$14 with lunch if received after March 29 (\$4 without lunch)***

The Western Region will pay for lunch for your community's bus driver.

Please make check out to: "Western Region CCCR of NC"

Mail registration form and check to:

**Roberta Hall, Treasurer, 500 Lenoir Road, Morganton, NC 28655-2669**

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and activities of the organization. Barbara Bennett, Investor Education Specialist, Securities Division, will speak about scams and how to recognize and avoid them. Then Ethan Uslan, the winner of several national contests for ragtime pianists, will entertain us with his music.

The business meeting will follow lunch. Tours of Aldersgate will be available before and after the meeting.

Please complete the registration form, which appears on the facing page, and plan to attend the annual meeting of the Western Region, where you may see friends and make new friends as well as receive interesting information and enjoy lively entertainment.

### **Directions to Aldersgate**

Aldersgate is located at 3800 Shamrock Drive in Charlotte. We're in Mecklenburg County, between Eastway Drive and Sharon Amity Road, just 3 miles from uptown Charlotte! Our telephone number is 704-532-7000.

*From I-85 N:* Take Exit 41, make a right onto Sugar Creek Road. Follow Sugar Creek Road for approx. 3 miles. Bear right onto Eastway Drive. Follow Eastway to next traffic light. Turn left onto Shamrock Drive. Follow Shamrock to the first traffic light. Turn right into the main entrance of Aldersgate.

*From I-85 S:* Take Exit 45A onto Harris Blvd. East. Follow Harris Blvd. to Sharon Amity Road. Turn right on Sharon Amity Road. Follow Sharon Amity for approx. 1 mile. Turn right onto Shamrock Drive. Follow Shamrock to the first traffic light. Turn left into the main entrance of Aldersgate.

*From most South Charlotte locations:* Take Sharon Amity across Independence Blvd. Stay on Sharon Amity across Central Ave. Follow Sharon Amity to Shamrock Drive.

Turn left onto Shamrock. Follow Shamrock for approx. 1 mile to the first traffic light. Turn left into the main entrance of Aldersgate.

*Marie Pearce*

Vice Chair, Western Region

### **Eastern Region**

THE EASTERN REGION has two important meetings scheduled. Plans for the Annual Meeting will be made on Tuesday, January 22, at Penick Village in Southern Pines. The meeting will start at 10:15 AM. This meeting is for all representatives and alternates to plan topics and speakers for the program. Program suggestions are welcome from all residents. Give them to your local membership chairman, who is your representative.

The Annual Meeting will be held Tuesday, April 23, at The Forest at Duke, in Durham, with registration beginning @ 9:30 AM. More information will be provided by your local representatives. We hope attendance will be great. The spring weather here should be lovely!

*Ethel Foote*

Eastern Region Chair

### **Central Region**

THE CENTRAL REGION'S 2013 Annual Meeting has been set for Thursday, April 25, at Twin Lakes Community in Burlington. Registration and social time with coffee and Danish will begin at 9:15 AM. The program will begin at 10:00 AM. There will be a brief business meeting at noon followed by lunch (included in the registration fee). In accordance with interests expressed at our Central Region Steering Committee meeting in Octo-

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ber, the topic for our program will be “Emerging Alternative Models for Providing Continuing Care to Older Adults.” As suggested by the Steering Committee, we will use a program format allowing time for questions and answers and discussion. Further information regarding the main speaker(s) will be distributed through our community representatives as specifics are finalized.

Please put this date on your calendar and join us for a day of fellowship and learning. It will help us in planning for space needs, refreshments, and lunch if you return the registration form, which appears below, by April 15.

*Randall Edwards*  
Chairperson, Central Region

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**ANNUAL MEETING OF THE CENTRAL REGION**

**Twin Lakes Community  
April 25, 2013**

**Registration Form — You must use this form to register — Please print**

NAME/NAMES \_\_\_\_\_

COMMUNITY \_\_\_\_\_

ADDRESS \_\_\_\_\_

PHONE \_\_\_\_\_ E-MAIL \_\_\_\_\_

I (we) have the following dietary restrictions \_\_\_\_\_

***COST: \$12 (includes lunch) for members  
\$15 (includes lunch) for nonmembers***

Please make check out to: “NCCCRA–Central Region”  
Mail registration form and check to:

**Gordon Forester, Treasurer, 3600 D Wildflower Drive, Greensboro, NC 27410**

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*Interview with Harry Groves, CCCR of NC Founder*

## **The Origin of CCCR of NC and NC General Statute, Chapter 58, Article 64**

IN 1986 I HAD RETIRED FROM TEACHING in the Law School at the University of North Carolina as my wife's health was failing and she had grown very ill. We felt an urgency to move to a continuing care retirement community where health care would be more readily available and entered the Springmoor CCRC in Raleigh.

Initially we were both satisfied with our decision, but it wasn't long before I noticed many things that raised doubts about our choice. Springmoor had a very unusual structure. It is a not-for-profit facility, but the man who started it owned the land and the buildings. His wife was the sole decorator of the buildings. The owner presided over the monthly meetings of the residents association and controlled its agenda. In other words, Springmoor was his community and his decisions were not to be questioned. I found this very troubling and wondered whether NC residents of CCRCs had any legal rights protecting the major financial commitment made to enter.

I went to the library of the UNC Law School to look for an answer. I learned that there was a law that required CCRCs in NC to submit an annual disclosure statement to the State each year but there were no sanctions if they failed to do so. When I asked to see a copy of it, no one could find where they were kept. A search at the appropriate office finally turned up a cardboard box with a few copies in an abandoned toilet room. In other words, there was no legal reason why a CCRC owner in NC couldn't change the use of his property and force residents out of the

homes they had paid to occupy. That would be highly unethical but not illegal.

This caused me to look at the laws in every state for regulations that applied to CCRCs. I found that several states had laws that provided rather extensive protections to residents. Other states had no laws or meaningless laws like the one in NC. In many states the laws were poorly drafted and not very useful.

Next, I extracted the provisions of state laws that I thought were important and started to write a draft law for NC. I was able to take ideas from existing laws, strengthen them where necessary, and make them applicable in North Carolina.

I also wrote some new provisions that did not appear elsewhere, based on my experience of living in a continuing care community.

One of the important issues that needed to be resolved was how the proposed legislation would be monitored and enforced. The legislation called for the auditing of the books of CCRCs and, in the event one of the communities got into financial difficulty, a state agency representing the interests of the residents would step in to try to prevent that from happening. Throughout the country a variety of different agencies are used for this purpose. I thought that for NC the Department of Insurance would be the most logical agency in which place to place this responsibility.

At first, the head of the Department of Insurance opposed assuming this responsibility, as he didn't see the need for it. But after some effort he agreed to add this task to his department. It required him to seek addi-



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tional budget for one new employee who would oversee the application of this legislation to all continuing care communities throughout the state. The law also required the appointment of a small advisory committee to work with the head of the Department of Insurance. Other members of committee would consist of a lawyer, a CPA, an architect and a generalist with no specific background. He appointed me to serve on this committee and I thought it was a very effective means of independently seeing issues statewide.

The law also included the right of residents to organize, meet with, and question members of the Board of Directors, and receive financial reports, etc.

When I was satisfied with the draft of the legislation, I had to get advice about how to proceed. Earlier I had been the Vice President of the NC State Bar Association and knew the woman who had been quite effective as a lobbyist for the Bar Association. I went to her to ask how one goes about getting a law enacted. She told me three things were required. First, I needed a copy of the proposed law. I had that. Second, she told me I would need to hire a lobbyist and that would probably cost at least \$15,000. Third, and most importantly, I needed a constituency. She said no matter how good the law was, if I were the only person interested in getting it passed, it wouldn't happen.

With an urgent need to develop a constituency I formed a not-for-profit corporation named the Continuing Care Community Residents of NC. It was easy to find the three persons needed to sign the application for incorporation.

I first started getting members for this new corporation at the place where I lived. I had some success except that the management was very suspicious and negative when they heard about it. More importantly, many of the residents feared the management, which I

thought was the result of residents not having any legal rights that were enforceable. Several of the residents told me that they would listen to what I had to say if I visited their villas or apartments at night so that the administration would not know that they had received me. By doing this I developed a decent number of persons willing to join CCCR of NC.

Next I went to Carolina Meadows in an effort to increase the constituency I was seeking. At that time Dr. Charles Weller was the president of the residents association. This residents association had just incorporated itself for the purpose of bringing a lawsuit against the Carolina Meadows administrator because they were extremely unhappy with the executive director. When I told Charlie what I had in mind with this legislation, he could not have been more enthusiastic because he saw the proposed law as being able to deal with the very kind of problems that they were experiencing. He called a meeting of the residents at which I explained what I had in mind and read the essential elements of the law. There was considerable enthusiasm. We picked up a substantial number of residents as members of CCCR of NC. I then went over to Carol Woods to try the same thing. The president of their residents association was much more reluctant about receiving me, and, in fact, felt she needed to get the permission of their executive director. Fortunately, he turned out to be a very able and liberal man. But he invited me to speak with the leaders of the resident association, rather than hold an open meeting. I did get a small number of residents from Carol Woods.

With this I had residents from three different CCRCs. I took about a week to travel and visit a number of other CCRCs in the state as far west as Asheville. In every instance, since I did not know the name of the president of each residents association, I contacted the



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executive director of each community. All of them were somewhat hesitant and skeptical about the law, but some of them were more receptive than others. Some allowed me to meet with the presidents of their residents associations. In several places the residents told me they were happy and didn't see any reason for having the law. In some places the executives would not allow me to meet with their residents but were polite enough to invite me to lunch. In these cases the only residents I could meet were those who happened to be at the lunch table. I got very few new members during this time and decided to just move forward with the members we had.

The next step was to get the law introduced in both the NC House of Representatives and the Senate. It happened that I knew and was friendly with an important member of the House, Mickey Michaux, who was a reasonably powerful member in the House of Representatives. He agreed to introduce the bill in the House. Also, I had a friend at the Springmoor Community who was good friends with a member of the Senate. After we met with him he agreed to introduce the legislation in the Senate.

Realizing that I needed as many legislators as possible to become familiar with the bill, I took over the lobbying effort myself. It wasn't so much that I was not willing to spend the \$15,000 but I just couldn't believe that any paid lobbyist could do the same job that I could do as a resident. Since I had written every word of it, I knew the law, was totally committed to it, and also knew a number of the members of the legislature. So I practically lived at the legislature for several weeks. I ate my lunches at the legislative building and tried to visit as many of the legislators as I could. What I discovered was that nobody knew anything about continuing care communities; so I had a real educational task to do. I also found that some of the

legislators were thinking about their parents who needed to find a comfortable place to live in old age. No one had any reason not to support the proposed law. The statewide organization of CCRC executives employed a lobbyist but chose to neither support nor oppose the bill.

When the bill came before the appropriate committees for a hearing, I arranged to have several carloads of residents from Raleigh and Chapel Hill to just be present at the hearings. I took the floor to explain what was being proposed and to urge adoption of the law. For each of the hearings there were perhaps 20 residents present. Their job was to just sit there so that when the legislators looked around the room they saw older people who looked like their parents or grandparents. I think that was effective. In any event, the law absolutely sailed through the committees of both the House and Senate. It was then passed by the full Senate and needed only to be approved by the House. There, for the first time, I encountered real difficulty.

The man who was the chairman of the House Rules Committee was feuding with the Senator who had introduced the legislation in the Senate. He absolutely refused to release the legislation in the House. I argued and pleaded with the chairman, stressing that his anger at the Senator had nothing to do with the legislation. But he was not moved. Fortunately, I happened to know from a previous connection in AARP, a man named Woodrow Sugg who had a long and distinguished career as a lobbyist for education and was highly regarded by many people in the legislature. His role proved to be absolutely critical for success. Without a vote in the House we would have been forced to start again the following year. I contacted Woody and explained my problem. He told me of a friend of his in Wilmington,

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home turf for the chairman of the Rules Committee. Woody called her, explained the legislation, stressed its importance and urged her to call the chairman of the Rules Committee, as a special favor to him, and let the bill go to the floor of the House for a vote. This she did. On the very last day the legislature was to be in session, the chairman of the Rules Committee allowed the bill to come to the floor of the House. It passed unanimously! I had already talked with the governor about the bill. He had no objection to it and promptly signed it when it came before him.

That is how, in 1990, the North Carolina General Statute, Chapter 58, Article 64, became law. There was an early interesting consequence of the law.

The owner of the Springmoor Community had considerable influence in the legislature. Early on in my efforts to get the law enacted, I think he thought I was an “old bird who didn’t know what he was doing” and nothing was likely to come of it. He really did not get alarmed until the law was just on the

verge of being enacted. By then, whatever opposition he wanted to muster could not prevent the law from being passed. However, he and all the staff of Springmoor felt threatened and betrayed and considered me a wild-eyed liberal. They called me a communist and troublemaker and I don’t know what else. My stay there was increasingly unpleasant and I finally told my wife that, although we were under a no-refund contract, I wasn’t going to continue to live there. We were going to move to Carolina Meadows and I would simply lose the money that I had invested in Springmoor.

About two weeks before I had planned to go to the administration to inform them of my decision, the executive director asked me to meet him in his office. There he told me that if we would leave, they would return my money! And that’s what happened.

*Harry Groves*

As told to Myles Walburn, Carolina Meadows,  
July 31, 2012

### **The State of Our Dwellings—A Query**

THE FRIENDS HOMES at Guilford chapter of CCCR has been grappling with a question that needs input from other retirement communities. Its steering committee has been focusing on what renovation policy might be the best one we should urge on our administration regarding apartments that have been occupied for many years by the same residents. Residents who have lived in the same place for many years are likely to be quite old, with diminishing resources. They are not likely to decide that their resources need to go into renovations.

We are considering urging on our administration some renovation commitment either after a certain number of years of occupancy or in terms of a certain monetary amount.

However, before we go further, we would appreciate learning what renovation policies are followed in other retirement communities, to what extent they are commitments included in the initial contracts, and to what extent they are charged for in the initial entrance down payments.

Please advise Ted Benfey, former chair of our CCCR chapter, at [benfeyo@bellsouth.net](mailto:benfeyo@bellsouth.net) He intends to summarize the findings in a future *Hotline*. We appreciate your help.

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“Lanes of Light” at Twin Lakes

TWIN LAKES, COMMUNITY, in Burlington, has created a “Winter Wonderland.”

Four years ago the residents created displays with the hard work of the woodworking shop and painters, and together with help of the groundskeeping staff and others, developed a beautiful two-evening event for family and friends to enjoy. Not only did residents decorate their homes and cul-de-sacs, but the whole campus was lit up with lighted Christmas trees on the ponds, and wreaths and displays of Santa with his reindeer, snowflakes, and other fantasies placed around the drive that circles the campus. Each year since, new items have been added. This cooperation has produced a wonderful spirit among everyone here at Twin Lakes, with many improving and enlarging the displays, which has made for a more delightful event each succeeding year.

This plan has progressed into a food-raising project for Loaves and Fishes. For two evenings in early December the campus is lit up and our residents welcome visitors with home-made cookies. The entrance fee for each carload of sightseers is now a can of food or a monetary donation. Each year the number of people coming to see our Winter Wonderland has increased enormously. In 2011 we had 900 cars and collected 2 tons of canned goods!

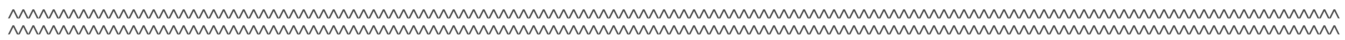
Yvonne de Jong
Twin Lakes Community

Unhappy Birthday To You Rites of Passage and the words we hardly dare utter

It's not a matter of turning sweet sixteen any more,
or the excitement of entering adulthood
at your Twentieth or Thirtieth in the full flush of youth.
Now, one by one, you're greeting each decade
with a birthday that's a sobering passage rite.
Let's start with the dreaded F—words,
Forty; the final goodbye to adolescence,
the arrival of early middle age,
a realization that the clock is ticking
on one or more biological functions.
Exactly ten years later it's time for another F-word,
Fifty; yes, that's still you in the mirror,
but look at the white hairs, a growing bald spot and wrinkles.
And, yes, it really is you (existentially)
up to your ears in this all-too-grownup world
of mortgages, 401Ks and such
trying to keep up or get ahead, even when you don't count
the cost of tuitions or saving for retirement
in the great American middle class, middle age
One by one the S-words come:
Sixty, when you woke up to the fact that
you're no longer a young Turk;
you're just an old fart.
Then suddenly you're Seventy;
as the pills and bills accumulated
you were getting used to early old age.
Turning Eighty, you realize with a sigh
what a shame it would be for you to leave life now,
just when you're finally getting the hang of the damn thing.
And then, suddenly, it's time for the N-word,
Ninety. Well, so far, so good. You've learned a lot. '
But, no matter what you've read,
no matter what you've heard,
nothing really happens
until it happens to you.

Ned Arnett
The Forest at Duke

Reprinted from *The Forester*, May 2012



The *Hotline* is published for the Continuing Care Community Residents of North Carolina, Inc., c/o NCCCRA Vice President Clinton V. Willis, Jr., 3 Kintyer Court, 2200 Elm Ave., Laurinburg, NC 28352; (910) 276-2739; genclint@bellsouth.net. Submissions to the *Hotline* and other *Hotline*-related communications should be addressed to Clint Willis.

<NCCCRA.org>
**The NCCCRA HomePage is
 your source
 for information—
 check it out!**

Membership Application

One-year membership is \$7 for an individual, \$14 for a couple. Life membership is \$50 for an individual, \$100 for a couple. **Checks should be made payable to NCCCRA and given to your community's NCCCRA representative**, so he or she can keep an accurate tally of members. Please indicate whether you are a renewing or new member. If you are not sure who your community's NCCCRA representative is, you may find out by contacting NCCCRA Vice President Clinton V. Willis, Jr., 3 Kintyer Court, 2200 Elm Ave., Laurinburg, NC 28352; (910) 276-2739; genclint@bellsouth.net. If your community does not have a representative, mail checks to: NCCCRA, c/o Susan Rhyne, 3913 Muhlenberg Court, Burlington, NC 27215. The form below is provided for your convenience.

 APPLICATION FORM (please print or type) *For membership year* 2013

 (Your name) _____
 (Spouse's name, if applicable)

Community _____

Address _____

Status (please check one): Renewal New member

Enclosed is payment for (please check one):

One year: \$7 single \$14 couple Life: \$50 single \$100 couple

