



# The hotline

NORTH CAROLINA CONTINUING CARE RESIDENTS ASSOCIATION

## NorCCRA ANNUAL GENERAL MEETING

TUESDAY, OCTOBER 3, 2017

Christ United Methodist Church, 410 N. Holden Road, Greensboro, NC

*Registration deadline: Saturday, September 23*

### FROM THE PRESIDENT, BRENDA TREMOULET

#### Do The Research! Become a resident advocate.

Where can you find:

- Facts about the 59 CCRCs in North Carolina?
- Current information about our CCRC resident organizations: NorCCRA, NaCCRA?
- Entrance fees and amenities?
- Occupancy statistics?
- Assistance with Health Insurance?
- Certification and accreditation of CCRCs?
- What is a “Life Plan Community”?

On web sites there are resources where you can find important information about issues that affect the CCRC industry. The following identified resources and contacts provide some facts and information to assist in advocating for others and yourself.

North Carolina Department of Insurance web site: [www.ncdoi.com/SE/](http://www.ncdoi.com/SE/) provides *Continuing Care Retirement Communities Reference Guide* .

[www.ncdoi.com/SE/Documents/CCRC/CCRC\\_Guide\\_2017.pdf](http://www.ncdoi.com/SE/Documents/CCRC/CCRC_Guide_2017.pdf): The 100 page 2017 version provides current self-reported information about the 59 CCRCs registered by the North Carolina Department of Insurance, Special Entities Section.

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The NC Department of Insurance also provides assistance in the search for health insurance. To find

a counselor in North Carolina use the site:

[www.ncdoi.com/SHIIP/](http://www.ncdoi.com/SHIIP/)

A SHIIP counselor assisted a resident in an appeal that reduced a medical bill of \$27,355.58 to \$1085.04.

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The North Carolina Continuing Care Residents Association (NorCCRA) [www.ncccra.org/](http://www.ncccra.org/) is an advocate for strong laws, regulations and general practices for the protection and wellbeing of Continuing Care Retirement Community residents.

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The National Continuing Care Residents Association (NaCCRA) [www.naccra.com/](http://www.naccra.com/) has information about CCRC residents in other states. NaCCRA’s goal is to make sure our CCRC communities are as good as they can be...not only

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for us but also for those who will follow us in the future. We believe that CCRCs should be encouraged as a matter of public policy. Our members and leaders work together to ensure that the CCRCs we live in are well managed and properly regulated.

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LeadingAge North Carolina [www.leadingagenc.org/](http://www.leadingagenc.org/) provides information for administrators and consumers of not-for-profit CCRCs. LeadingAge North Carolina provides expanded possibilities for aging, value to its members, and leadership to the field of aging. Such information as Medicare, Medicaid certification, CARF accreditation for each NC CCRC is located in the LeadingAge membership directory.

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The national organization of LeadingAge [www.leadingage.org/](http://www.leadingage.org/) states:

*The mission of LeadingAge is to be the trusted voice for aging.*

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Star ratings for Medicare certified CCRC skilled nursing units might be found on either of the two web sites:

[www.health.usnews.com/best-nursing-homes](http://www.health.usnews.com/best-nursing-homes)

[www.medicare.gov/nursinghomecompare/search.html](http://www.medicare.gov/nursinghomecompare/search.html)

CALENDAR 2017	
October 3,	AGM at Greensboro
October 28-29,	NaCCRA AGM, New Orleans
October 29-Nov 1	LeadingAge fall meeting & expo New Orleans
November 10	Deadline for December <i>Hotline</i>

**AGM FEATURED SPEAKER**

**TOM AKINS**



Tom Akins serves as President and CEO of LeadingAge North Carolina. The Association, based in Chapel Hill, has 68 nonprofit member communities statewide that include continuing care retirement communities and affordable housing providers. Its members employ 14,000 mission-oriented staff serving more than 20,000 North Carolinians. The Association

offers education, advocacy, networking, and shared services and is the state affiliate for LeadingAge in Washington, DC (an association of 6,000 nonprofit organizations dedicated to expanding the world of possibilities for aging).

Akins has 20 years experience in aging services. He served as the first national president of the LeadingAge Leadership Academy's 275-member Alumni Network and continues his service with them as chair of their nominating committee. He is a member of the executive committee and treasurer of Value First, a Minneapolis, Minnesota based group purchasing organization that works with the aging services field. Akins also serves on the statewide steering committees for the Alliance for North Carolina Nonprofits, the North Carolina Institute of Medicine's Alzheimer's study group, and the North Carolina Partnership for Compassionate Care.

A Kansas native, Tom has been extensively involved in public policy, having worked for the Kansas Legislature and for United States Congressman Dan Glickman. He has an undergraduate degree from Emporia State University in Kansas and has done graduate work at the University of Kansas. He was a licensed nursing home administrator in Kansas. He is married and has two daughters.

Yearly meetings
NaCCRA Exec Committee: 2nd Friday (teleconference 2pm every month)
NorCCRA Board meeting: May at Central Region CCRC
NorCCRA annual meetings October, Greensboro April, Washington, DC

AGM FEATURED SPEAKERS

STEVE FLEMING



President and CEO, The Well•Spring Group, Greensboro, NC.

The Well•Spring Group is a multi-modal aging services provider serving over 1200 individuals and their families. Services provided by Well•Spring include operating two award winning continuing care/

life plan communities, Adult Day Services, Caregiver Educational Services, Long Term Care Coordination Services, Home Care and PACE (Program for All-Inclusive Care for the Elderly).

- Chair, Board of Directors, PACE of the Triad, Greensboro, NC.
• Secretary/Treasurer, Board of Directors, PACE of the Southern Piedmont, Charlotte, NC.
• Chair-Elect, Board of Directors, LeadingAge, Washington, DC.
• Chair, UNC-Greensboro School of Nursing Advisory Board, Greensboro, NC.
• Board of Advisors, Beaver College of Health Sciences, Appalachian State University, Boone, NC.
• Past Chair, Leading Age North Carolina, Raleigh, NC.
• Past Chair, North Carolina State Board of Examiners for Nursing Home Administrators, Raleigh, NC.
• Past President, Greensboro Airport Rotary Club.
• Past Chair, Health Care Management Advisory Board, Appalachian State University.
• BS Public Health, Health Policy and Administration (1986) UNC-Chapel Hill.
• MBA (1990) Appalachian State University.
• Graduate Fellowship in Strategic and Financial Planning (2006) Harvard Business School.

Married, Wife of 30 years – Anne, Daughters: Brooke (24), Elizabeth (20).

STEVE JOHNSON

Born and raised in Queens, NY
St. John’s University – attained a BS in Accounting

Business Experience

4.5 years as Senior Auditor at Coopers & Lybrand, CPAs (now PricewaterhouseCoopers, LLP)

6.0 years as Manager of Financial Reporting for a Fortune 500 company that owned Piper Aircraft and Smith & Wesson in Greenwich, CT

3.0 years as Assistant Controller at Horn & Hardart in NYC

10.5 years owned 2 multi-point petroleum products distribution companies in the Hartford, CT area

3.0 years as NCDOI Supervising Examiner

9.0 years as NCDOI Assistant Chief Financial Examiner

7.0 years as NCDOI Manager—Special Entities

43.0 years in the workforce

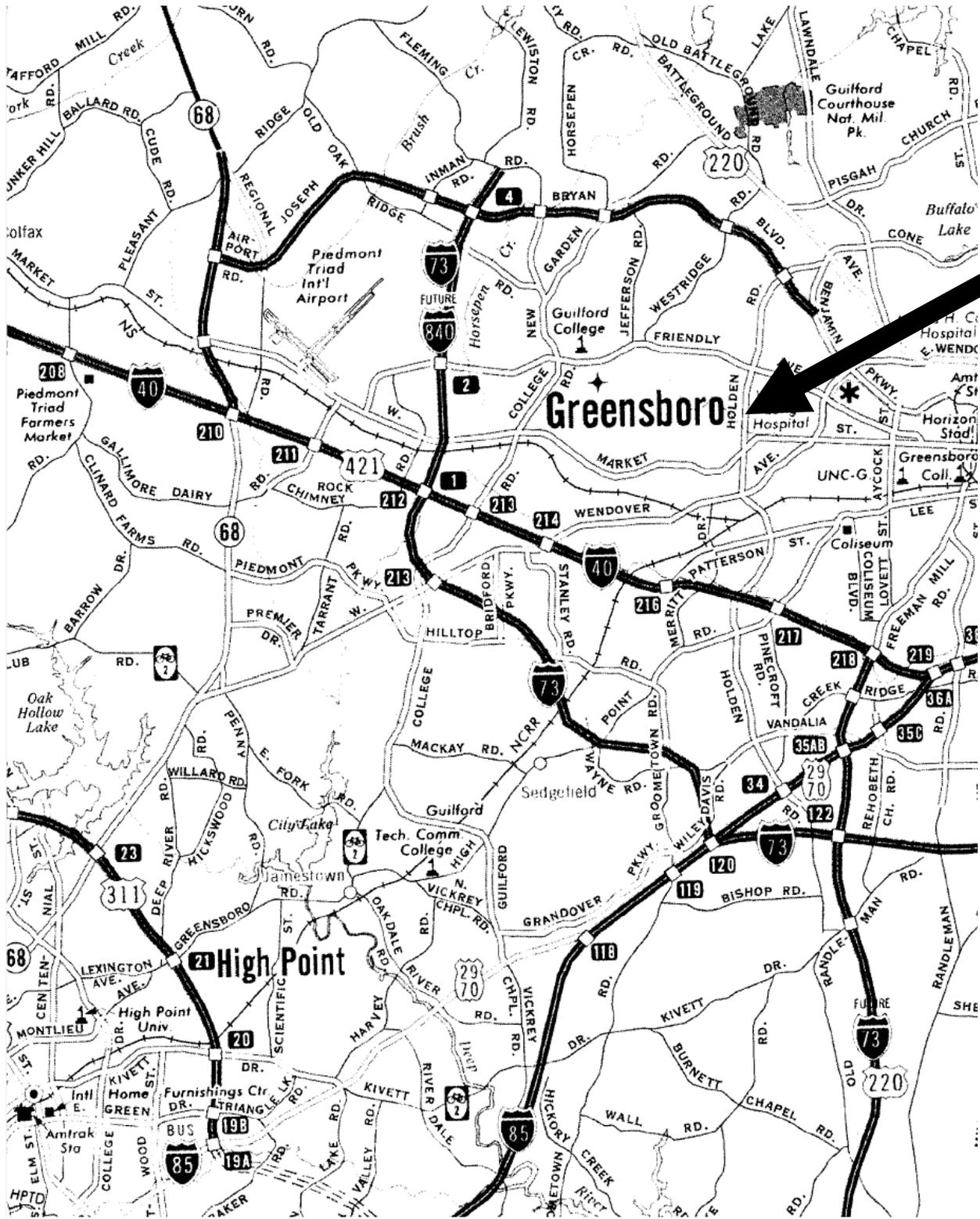
Other

Licensed Private Pilot and a Certified SCUBA Diver

WANTED

The current editor is retiring and The Hotline needs a new editor.

If you have some knowledge of editing or working with Microsoft Publisher, or you know someone who has, please contact Bernard Coleman at gothic63@charter.net or give him a call at 828-277-5813



**DIRECTIONS TO THE AGM**

**To Reach the Church (410 N Holden Road)**

**From the West on I-40:** Take I-40 (not the new bypass) past Guilford College Road to Wendover Avenue. Go left (east) on Wendover to Holden Road. Go left (north) on Holden past Market Street. The church is a few blocks after Market, on the right, well back from the street but easily visible.

**From the East on I-85:** Take I-85 to Business I-85; Continue on Business I-85 past US 421 and US 220 to Holden Road. Go right (north) on Holden past Vandalia Road, High Point Road, Patterson Street, Wendover Avenue, and Market Street. The church is a few blocks after Market, on the right, well back from the street but easily visible.

**From the South on I-85:** Take I-85 to Business I-85. Continue in the same direction (east) on Business I-85 to the next exit at Holden Road. Turn left (north) on Holden past Vandalia Road, High Point Road, Patterson Street, Wendover Avenue, and Market Street. The church is a few blocks after Market, on the right, well back from the street but easily visible.

**From the South on US 220:** Take US 220 past new I-85 to Business I-85, turn left (south) on Business I-85 to the next exit, Holden Road. Turn right (north) on Holden past Vandalia Road, High Point Road, Patterson Street, Wendover Avenue, and Market Street. The church is a few blocks after Market, on the right, well back from the street but easily visible.

**NorCCRA ANNUAL MEETING  
Christ United Methodist Church, Greensboro, NC**

**Tuesday, October 3, 2017**

<b>9:30–10:15 AM</b>	<b>Registration, refreshments , and fellowship</b>
<b>10:15 AM-12:00</b>	<b>General program</b>
<b>12:00–1:00 PM</b>	<b>Lunch</b>
<b>1:00 PM</b>	<b>Business session</b>

**REGISTRATION FORM**

Please register me (us) for the NorCCRA Annual Meeting, October 3, 2017

Name(s) Please print \_\_\_\_\_

Address \_\_\_\_\_

Community \_\_\_\_\_ email or phone \_\_\_\_\_

I (we) have the following dietary restrictions:

\_\_\_\_\_

**Please check the appropriate registration blank:**

\_\_\_\_\_ **Member NorCCRA**                      **Cost \$10.00 for registration and lunch**

\_\_\_\_\_ **Non-member**                              **Cost \$12.00 for registration and lunch**

**Mail this form and your check made payable to NorCCRA to**

**Susan Rhyne, 3913 Muhlenberg Court, Burlington, NC 27215.**

**Reservations must be received by Saturday, September 23.**

## RE-INVENTING THE “WELCOME WAGON”

Bill Hubbard, Deerfield, Asheville, NC.

It seems fair to assume that the residents and staff of CCRCs work hard to develop various ways to help new residents become familiar with their new neighbors. It also seems fair to assume there is room to help all residents find common interests among themselves and their municipal community. Following this line of thinking, I am sharing some of the steps I have taken in our own CCRC.

My wife Marilyn and I moved to Deerfield Episcopal Retirement Community in Asheville, NC in the fall of 2013. During our second year I volunteered for the Deerfield Relations Committee. The mission of this committee is to welcome new residents and help them become integrated into their new retirement community.

Marilyn and I had lived in the Asheville area for nearly 20 years and were quite familiar with Asheville and its surrounding communities. Also, we were closely connected to the creative individuals and associated organizations of Asheville as well as a good number of favorite “small box” retailers. Thus, I decided that my best role in the Relations Committee would be to help relieve anxieties new residents might have about our small city and enable them to enjoy its offerings.

Obviously, they would be concerned about things such as where to park. But beyond basic logistics, I wanted them to be aware of what our local businesses and creative culture had to offer and how to take advantage of such opportunities. Asheville is well known for its restaurants, galleries, shops, performance venues, outdoor activities, and now for its breweries.

The steps I take have evolved over the past three years. Early in their entrance I give new residents a one page letter which is not only a note of welcome, but which contains a number of invitations. The letter invites them to come to our apartment for tea, meet for a glass of wine in the Canons Corner, share a meal in our Bistro, or go together to some event.

Beyond that I invite them to join my residents only “Local Music Scene” email list. I don’t list well publicized events such as the Asheville Symphony Orchestra—to which Deerfield provides a bus. What I do list are new openings and events at museums and art galleries. There are many under-publicized house concerts, performances at small venues, specialized email lists, and various performances by individuals or groups we know, etc.

As of this writing, I have about 100 names on this email list. We use the listings for what I call RandD—Ride and Dine. By sharing rides, eating together, and then enjoying a performance or other event, we continue

to become better acquainted with one another as well as find new things to do in the area. I would be remiss if I didn’t mention these activities help support our locally owned businesses and creative individuals and organizations thus adding to the economic engine of Asheville. And, I am not paid by our Chamber of Commerce. A hint might be due here—such participation in the broader community is good marketing and public relations for a CCRC.

Marilyn and I are trained Asheville Urban Trail guides. In our “copious free time” we lead walking tours for up to 10 residents at a time. We meet in a community room for about half an hour to talk about what we are going to see. We then car-pool to downtown and visit about half the tour of 30 stations—history, architecture, culture, etc. At mid-tour we have lunch in a private room of a restaurant. We use that opportunity to review what we have seen and answer questions. We then complete the 2-mile walk. In addition to explaining what is on the 30 official markers, we also show them our favorite restaurants and venues, where to park, and so forth.

Now back to the title of this article. Do you remember when community residents—usually women, bless their hearts—provided *Welcome Wagon* baskets for incoming residents? If new residents wish, I give them my version of the *Welcome Wagon* basket. Normally I do not offer this to new neighbors who are from Asheville—only to those who come here from “off” as they say in the mountains.

It is an expandable file folder with a five-page introduction to their new community. The introduction gives some history, lists our favorite restaurants, performance venues, art galleries, shops, suggested regional authors, UNC-Asheville and area colleges. The folder also contains various maps of Asheville and the area. I enclose many brochures from art galleries and museums, area performance venues, dining guides, guides to events, and local attractions such as the NC Arboretum, etc. I also enclose the Season Brochure of the Diana Wortham Theatre. As a board member, I offer recipients a pair of gratis tickets if they have not been there before.

Each community and each CCRC is different, but I hope readers can find some ideas from this story that might be useful in their own retirement communities and their broader municipalities.

Bill Hubbard  
24 Highbridge Crossing, Apt. 1215  
Asheville, NC 28803  
828.274.6298

## THE SENIOR HUDDLE

The Senior Huddle began in January 2017 as a response to the energy generated by the Women's March on January 21, 2017. There was so much enthusiasm here at Deerfield that a group was convened to see if there was interest in continuing to meet and discuss issues of importance to all. We met as a group, decided upon relevant issues (local, statewide and national) and began to do research into those subjects.

A PURPOSE was established as follows: "A nonpartisan group seeking to learn about issues that affect all people and to take actions for the well-being and safety of our nation and world."

There was a room full of excitement at the first monthly meeting. Topics of interest were selected and each person—woman or man—signed up for a group that would identify current and future happenings within their own identified personal interest.

Groups continue as: Environment, Voting, Planned Parenthood, HealthCare for seniors, Education, Economy, Non-Discrimination, and Advocacy. Each group provides one speaker who reports for that group. The floor is open for questions after each report and if new people wish to join that group, they may do so after the meeting is adjourned.

The Huddle has a facilitator, a roster-keeper, a secretary, an event coordinator, and a couple of volunteers who set up and take down the chairs after the meeting.

Statistics on the Senior Huddle vary. The list of those who expressed interest was over 100. About half of that number is in regular attendance, which is considered remarkable as the subject matters require a lot of work from participants. In fact, the "short reports" have grown as more informative reports are given. We meet for an hour and allow time after for folks who want to break out in smaller groups and explore further.

We think it reflects Margaret Mead's statement that "A small group of dedicated people can change the world. In fact, it is the only thing that ever has."

Lane Waas, Deerfield, Asheville, NC.

## NORTH CAROLINA TO BE REPRESENTED ON LEADINGAGE PANEL

**Sindy Barker**, Chair of the NorCCRA Legislative Committee and resident at Carol Woods, and **Tom Akins**, President and CEO of LeadingAge NC, are part of a panel presentation entitled *Mobilizing Grassroots Advocacy: A Resident-Provider Collaboration*. They will be joined by **Mag Morelli**, Tom's counterpart in Connecticut, and **Kate Waterman**, a resident at StoneRidge in Mystic, CT.

The panel will be at the National LeadingAge Annual Meeting in New Orleans in late October. **Jack Cumming**, member of the NaCCRA Board of Directors submitted the topic to the LeadingAge conference committee. **Basil Pflumm**, President of NaCCRA will serve as moderator.

Panel members will be speaking on how LeadingAge state associations and resident leaders work together on legislative issues that benefit both management and residents. For example, each year LeadingAge lobbies effectively to maintain the CCRC non-profit status for property tax purposes and sales tax refunds to individual CCRCs. Both have a direct monetary benefit to the communities and their residents

The panel will also address the public policy issues that matter most to CCRC residents. This will include the example of our successful effort to reinstate the medical deduction for state income tax purposes and the whole issue surrounding Admission versus Observation and its financial impact on residents when they are discharged from the hospital.

The ultimate goal of the program is to demonstrate to attendees the ability of these two states to work collaboratively on important public policy issues. Another example is the LeadingAge NC Public Policy Agenda. Generally speaking they rank two or three issues as their highest priority. NorCCRA reviews these priorities and identifies the ones which residents could help promote effectively. One such issue coming in 2018 is an initiative by the NC Department of Insurance (DOI) to review and possibly make changes to the statute regarding CCRCs. DOI plans to put together a work group which will include CEOs and residents of CCRCs to collaborate on what is best for the broader continuing care community.

Stay tuned for how it goes in a later issue of *The Hotline*.

The *Hotline* is published quarterly, March, June, September and December by Bernard S. Coleman, Deerfield Episcopal Retirement Community, Asheville, NC, for NorCCRA President Brenda Tremoulet, 16 Salisbury Drive, #7116, Asheville, NC 28803 (828-505-1719)-[brenda.tremoulet@gmail.com](mailto:brenda.tremoulet@gmail.com). Submissions to the *Hotline* and other *Hotline*-related communications should be addressed to the editor, Bernard S. Coleman ([gothic63@charter.net](mailto:gothic63@charter.net)).

NORTH CAROLINA CONTINUING CARE RESIDENTS ASSOCIATION  
**[www.NCCCRA.org](http://www.NCCCRA.org)**  
**The NorCCRA\* home page is your source for information.**  
**Check it out!**  
 \* pronounced Norkra

### Membership Application

One-year membership is \$12 for an individual, \$20 for a couple. Life membership is \$80 for an individual and \$135 for a couple.

**Checks should be made payable to NorCCRA and given to your community's NorCCRA 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 NorCCRA representative is, you may find out by contacting NorCCRA President, Brenda Tremoulet, 16 Salisbury Drive, #7116, Asheville, NC 28803; (828) 505-1719; [brenda.tremoulet@gmail.com](mailto:brenda.tremoulet@gmail.com).

If your community does not have a representative, mail checks to:

NorCCRA, c/o Susan Rhyne, 3913 Muhlenberg Court, Burlington, NC 27215.

APPLICATION FORM (please print or type) *For membership year* 2018\*\*

\_\_\_\_\_  
(Your name) (Spouse's name, if applicable)

Community \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_

Status (please check one): Renewal New member

Enclosed is payment for (please check one):

**One year:** \$12 single \$20 couple **Life:** \$80 individual. \$135 couple

**\*\*Join now and enjoy immediate benefits.**