



# The Hotline

North Carolina Continuing Care Residents Association



[www.norccra.org](http://www.norccra.org)

## NorCCRA Annual Meeting set for October 9

**M**ark your calendars! This should be an exciting meeting with some timely speakers, including Katherine C. Pearson, professor of law at Pennsylvania State University, a well known authority on CCRCs. Professor Pearson currently teaches courses on elder law, wills, trusts and estates, nonprofit organizations law and contract law. Her academic focus in research and writing has been on laws and policies connected to aging. Professor Pearson is author of numerous articles and book chapters on long-term care, financing issues and filial obligations, and is the co-author of *The Law of Financial Abuse and Exploitation*. She is co-editor and a regular writer for the *Elder Law Prof Blog*. Information on her research and publications can be found on <http://sites.psu.edu/professorkatherinecpearson/>



**Katherine Pearson**

Chapel Hill, NC 27517) who will compile and forward your concerns to Professor Pearson by September 1. Note that some responses in the recent *Hotline* survey prompted your Executive Committee to invite Professor Pearson!

In addition to NorCCRA's president, financial, and legislative reports, other speakers for the Annual Meeting include Steve Fleming, Chairman of National Leading Age and CEO at Wellspring. Tom Akins, President/CEO of Leading Age North Carolina, and Steve Johnson, Manager of Special Entities Section for N.C. Department of Insurance.

### **What? NorCCRA Annual Meeting**

**When? Tuesday, October 9, 2018 at 10 a.m.  
9:30 a.m. for registration**

**Where? Christ United Methodist  
Church, 410 North Holden Road  
Greensboro, N.C.**



In her presentation Professor Pearson has agreed to try to address concerns NorCCRA members may have. Please send your questions to NorCCRA VP, Margaret Zircher ([zircher@me.com](mailto:zircher@me.com), or 330 Carolina Meadows Villa,

## Revisions of Bylaws and Standing Rules enclosed with The Hotline

**T**here is more to this issue of The Hotline than news and best practices. At NorCCRA's Annual Meeting in October, the membership will be voting on a revised set of bylaws and standing rules. Included with this issue is a draft of the revisions. Please study them before the annual

meeting in Greensboro so there can be a productive discussion of the changes.

The changes were drafted by NorCCRA Treasurer Franklin Sanders, who will lead the discussion in October.

Please bring your copy of the bylaws and standing rules with you October 9.



**Franklin D. Sanders**

## What is the law regarding providing the disclosure statement to prospective residents?

The above question was asked of NCDOT Regional Director for Coastal Southeast Marcie Kelly ([marcia.kelly@ncdot.gov](mailto:marcia.kelly@ncdot.gov)) at the Eastern Region NorCCRA meeting. Here is her reply:

"It was recommended by the Consumer Service Director to provide you with the CCRC Guide as it addresses most questions someone may have about CCRCs. The link to this guide is [http://www.ncdot.com/SE/Documents/CCRC/CCRC\\_Guide\\_2017.pdf](http://www.ncdot.com/SE/Documents/CCRC/CCRC_Guide_2017.pdf)

If this was not helpful, please let me know again what your specific question is and I will go back for a more definitive answer. "

For more information on the question see pages II and III of the 2017 Reference Guide Introduction for a summary of information on **Disclosure Statements** and **Annual Disclosure Statement Revision**. The referenced statute is printed in Appendix 6 of the Guide. In particular read § 58-64-20 - *Disclosure statement*, and § 58-64-30 - *Annual disclosure statement revision*.

Appendix 7 of the guide shows the N.C. Administrative Code, which has some interesting information on what is required of providers.

NorCCRA members have inquired about NC CCRCs with residents on their board of directors. The Guide, in the description of each CCRC, shows this under "other."

## YouTube Video of My Father's World War I Letters

by Dr. Martha Rowlett

Nov 11, 2018 is the 100<sup>th</sup> anniversary of the end of World War I on Armistice Day in 1918. That day, my father was in a six day march with a pack on his back in France after having been through the longest and bloodiest battle in American history. Our family has a box of 100 year old yellowed and fragile letters that he wrote to family while a soldier in the war. I read them last year to get a first hand view of the war, and was amazed at the picture the letters give.

My brother Pete had the discharge document that recounted where he had been in the war. I took that itinerary and the letters and wrote a story to be shared during this centennial year.

Last summer I decided to create a video of the story with the help of professional film makers . The film team became emotionally involved and outdid our expectations. We now have a 30 minute documentary on YouTube entitled



"Daddy, What Did You Do in the War? A Soldier's Story of World War I"

We are planning to commemorate this special day at Givens Estates by showing the film to the residents on November 8, inviting them to exhibit any memorabilia

they have, and tell about any contacts they have with the war. We will also have a sing-a-long of World War I songs.

If you are interested in using the film in a commemorative event in your community, it is available free for download from YouTube. To find it, use the film title with my name, or the link <https://youtu.be/6eSnOnu0k5g>.

The film ends with the camera scanning the huge military cemetery near the final battle and quotes the battle cry for the war: "to make the world safe for democracy." The last word is to express gratitude for all who do whatever is necessary in their time to "make the world safe for democracy."

## Travel Adventures Program at Croasdaile Village-Durham

by Judith Moore

**A**lthough Croasdaile Village offers many brief part-day excursions via bus for all residents in Independent Living, no overnight trips for active residents had ever been offered. Thanks to Patricia Gentry, our Director of Resident Services, that changed in 2017.

Patricia's trips are designed to challenge our more physically active residents. Residents participating in this program can walk distances, climb stairs, and meet other physical challenges without assistance. Our Wellness Center administers a Fitness Test for anyone questioning their ability to participate.

Patricia plans all the programs. She first checked with travel agencies but decided their trips were pre-designed without considering the interests of a senior population and did not offer enough flexibility. Contracting with a bus company means flexibility and the accommodation of last-minute changes. She uses a Google app to determine walking safety issues. Residents prefer not to be overly-scheduled, so time is blocked out for independent time including shopping and some dinners on their own. Ms. Gentry chaperones each trip and residents are given her cell number during independent excursions should they need her in an emergency.

That year there were four excursions of two to three overnights. In April the group travelled to Williamsburg and Jamestown for a two-night stay and visited the

D-Day Memorial in Virginia on the trip home. In June they journeyed to Natural Bridge in Virginia, took a carriage ride in Lexington, hiked, and went tubing on the James River. September was a three-night stay at Lake Junaluska. In addition to a pontoon boat ride on the lake and a 4.5 hour excursion along the Nantahala Gorge on a steam-powered train, they visited the

Wheels Through Time and Cherokee Museums. In November they stayed in Asheville for a tour of the Christmas display at the Biltmore as well as the Grove Arcade and a trip to Chimney Rock.

Both couples and singles are accommodated. A total of 78 different residents participated in the trips in 2017 with many traveling on all four trips. Totals for each trip ranged from 35-40.

In December all residents who had participated were invited to an off-campus Christmas dinner during which a slide program of all the trips was shown and each resident who traveled was given a DVD programmed with the slides for each trip.

The first trip in 2018 was to Charleston in April. The group toured Ft. Sumter, took a lunchtime boat excursion of the Charleston Harbor, toured Boone Plantation, and visited the Isle of Palms, Folly Beach and the Historic French Quarter. On the way home they stopped in Fayetteville for lunch and a visit to the Airborne and Special Ops Museum. Later trips are planned to Alexandria VA, the Outer Banks, and a leaf peeping trip in the fall.

Judith Moore is a resident of Croasdaile Village.



### Best Practices



**The National D-Day Memorial,  
Bedford, VA**



**Tubing the James River in  
Lexington, VA**



**A carriage ride in  
Lexington, VA**

## Up for the Challenge?

**W**hat if Harry Groves were the type person who waited for someone else to step up to the plate? Would we have a statute protecting citizens living in CCRCs from exploitation? Would we have NorCCRA and NaCCRA? The short answer is "No." Our Harry Groves was "Up for the Challenge."

Are you? The Central and Western Region offices of chairperson, vice chairperson, secretary and treasurer are vacant. NorCCRA needs YOU!

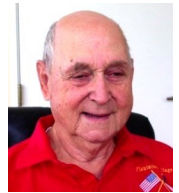
The chairperson sits on the Executive Committee and Board of Directors, and plans at least one regional meeting. The chairperson needs a telephone for monthly conference calls, and a computer for emails.

For more information, or to step "Up for the Challenge" contact Milton Gilbert ([mgilbert@nccumc.org](mailto:mgilbert@nccumc.org)) or Margaret Zircher ([mgilbert@nccumc.org](mailto:mgilbert@nccumc.org)). Others have done it, so can YOU! Think about it and volunteer for an office! Think about what it would be like without NorCCRA.

## Best Practices—Briefly

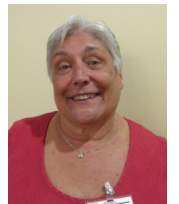
### From Plantation Village, Wilmington:

Because our residents wanted activities that required funding beyond the limits of our administration, we started the Memorial Fund. The Fund is a separate non-profit entity which buys equipment for jewelry-making, a fenced area for garden tools, a dog enclosure and some of the printing costs for our resident magazine. The Fund, which is administered by a resident committee plus one administrator, grows with each memorial or honor gift for our residents. Expenses greater than \$500 require approval of the Plantation Village Board of Directors.



**Herb Wile**  
Plantation Village

**From Aldersgate, Charlotte:** In October 2017, with permission from the administration and the support of the CFO, Aldersgate helped collect NorCCRA dues. All annual dues-paying independent living and assisted living residents were notified that NorCCRA membership dues were to be included on their upcoming bill. To opt out, residents had to notify the business office that they are not interested in being a NorCCRA member. The letter is available to others who would like to see what was said.



**Catie Webb**  
Aldersgate

Ask  
The  
Community

**W**ith this issue, *The Hotline* begins a new column called Ask the Community. Here is how it works: Send a question to the editor about CCRCs in North Carolina. We publish your question and your contact information. Readers who can answer your question contact you. Ready to play?

Sherman Poultney of Galloway Ridge asks: **Does your CCRC use irrigation wells and/or geothermal wells?** If your CCRC does, please respond to Sherman: [poultney2@gmail.com](mailto:poultney2@gmail.com)



**N**orth Carolina Department of Insurance Commissioner Mike Causey issued a Medicare Scam Alert in April 2018. Medicare cards will be replaced with New Medicare cards that no longer show Social Security numbers but instead show a Medicare Beneficiary Identifier. They will be mailed to you automatically and require no action on your part.

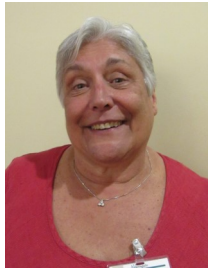
**Medicare will not call you. If someone does call and ask you to pay for the new card, offer early delivery or tell you that your card is being cancelled, hang up.**

## Minutes Summary: Annual Meeting of the Executive Board

Pennybyrn, High Point, N.C. May 22, 2018; 10:00 a.m. to 2:00 p.m.

### Actions by voice vote:

- Agenda approved
- Treasurer's report accepted
- Minutes of May 27, 2017 accepted
- President Gilbert appointed Herb Wile to the Executive Committee of NorCCRA as a special representative from the Eastern Region to support the President.



**Catie Webb**  
Secretary

### Reports Received:

**Keynote speaker:** Jeff Weathershead, Aldresgate's chief operating officer: It bothered Jeff and that the only time he heard of the careers, accomplishments and adventures of residents was at their memorial service. So, he gathered a group of writers who asked open ended life questions of residents and recorded their responses. At the end of 2018, look for a new play that dramatizes some of the stories they heard.

**President Milton Gilbert:** NorCCRA has been looking at three main things: advocating for the betterment of our Health Care Units, becoming more attentive to our decreasing membership and broadening our leadership in all our regions of the state so that all regions have officers and quality meetings.

**Vice President Margaret Zircher:** UNC-TV and UNC Department of Humanities are always looking for space for 50-300 people with audio-visual capacity and break out rooms for teacher education programs. If interested, contact Kamona Herring at UNCTV (kherring@unctv.org) or Max Owre at UNC (owre@email.unc.edu).

Responses to the questionnaire in the April *Hotline* showed members want less fluff and more significant articles. That includes issues relating to the legislature, best practices, medical, Medicare and problem resolution. Zircher introduced the new editor of *The Hotline*, Pete Prunkl, who reinforced members' requests for best practices and substantive articles.

**Treasurer Franklin Sanders:** The budget was compared to actual expenditures and NorCCRA is ahead of the budget year to date and should be on budget by year's end.

**Franklin Sanders:** NorCCRA currently has no officers for the Central and Western Regions. Making only two regions, Eastern and Western, means having teleconferences instead of in-person meetings. The Executive Committee is open to any and all suggestions for recruiting officers for each region. In the Eastern Region, the CCRCs assume the officers' responsibilities on a rotating basis and the annual region meeting is hosted by the region's president.

**Sindy Barker, Legislative Issues** (Gaye Eddy reporting for Sindy): Sindy is now on the Board of LeadingAge and is working closely with Steve Johnson of the NCDOL on getting out information regarding medical deductions. She is also working on opening up the state laws concerning CCRCs in the 2019 legislative sessions. We need to review these laws and revise them to address present day issues.

**Note: At the top of this page and others is our new website domain name.**

### NorCCRA Membership

- Western Region: 7 CCRCs, 386 annual members, 469 Life members
- Central Region: 9 CCRCs, 174 annual members, 566 Life members
- Eastern Region: 15 CCRCs, 1334 annual members, 2325 Life members.
- Of the 59 licensed CCRCs in North Carolina, 36 are members of NorCCRA.

**From Susan Rhyne**

## When do I make a difference? *by Milton H. Gilbert*

**W**e lived in the downstairs apartment of a duplex. The outer walls of the building were made of that white shingle material that gave an appearance of raked wall board. I remember it was summer and warm and school was out. It was the summer of 1949 and I remember it so very well. It was the summer that I first realized the value of family. I remember building a puppet stage out of an orange crate on the front porch of that rented duplex. I remember the cold water of Lake Michigan and I remember the movie theater where, that summer, I saw "The Boy with the Green Hair," and "Take Me out to the Ball Game," with Gene Kelly and Esther Williams. But most of all I remember the visit of Uncle Elias.

This old man was my father's uncle, my grandfather Edor's older brother. I don't remember the spirit of anticipation waiting for his arrival. But I do remember him getting out of the car and my meeting him, for what seems, to be the first time. He was a tall (he was probably not) handsome, caring person, that somehow took an interest in a soon to be eight year old boy. I remember his giving me all the time in the world. And I remember that his visit was just something special. I don't remember anything of which

we talked. I am sure I showed him my puppet stage, and my papier mache' puppets. I am sure I talked about my baseball glove and the Detroit Tigers, and probably even about the movies I had seen. What he said that day, what we did that day, have all disappeared from my memory, but his presence and his care for me, was a special gift. I never saw Uncle Elias again. I don't remember hearing of his death, or the rest of his life for that matter. But I remember that he gave me some precious moments and I will always have the memories of his visit as he stepped out of that car and I was told that this was my Uncle Elias.

Memories are sacred, said Eli Wiesel, and for me, what ever we did or said that day will always be a sacred remembrance. It was not what was said, or not said, it was that someone who I was supposed to admire took a special interest in me and I am better today because of that. That memory of Uncle Elias will stay with me forever, because he cared.



NorCCRA is an affiliate of NaCCRA. Be sure to also read their newsletter *Life Line* <http://naccra.com/life-line-newsletter.html>



### Application for membership in North Carolina Continuing Care Residents Association

Name: \_\_\_\_\_ Community: \_\_\_\_\_

Spouse's name (if applicable): \_\_\_\_\_

Address: \_\_\_\_\_

Email address: \_\_\_\_\_

Fee: \$12 for individual; \$20 for couple; \$80 individual life membership; \$135 life membership for a couple

Please make check payable to **NorCCRA**, and give with application to your local CCRC NorCCRA rep.

Otherwise, mail to Susan Rhyne, 3913 Muhlenberg Court, Burlington NC 27215

Thank you.