



The Hotline

North Carolina Continuing Care Residents Association

www.norccra.org

Annual Meeting, In-person! Tuesday, October 12 at Well-Spring

Assuming Covid restrictions do not come into play between now and October, NorCCRA will hold its first in-person meeting in over 22 months thanks to the gracious invitation from Well-Spring Retirement Community, 4100 Well-Spring Drive, Greensboro. NorCCRA asks that all attendees be vaccinated, and prepared to wear a face mask. Doors will open at 9 am, with a coffee/social hour until 9:30. It will surely be a lively one as long unseen friends are greeted. See pages 4-8 for the agenda, registration form (note deadline for registering is October 5), proposed bylaw changes, and proposed 2022 NorCCRA officers. Speakers include George (Tony) Butterworth, a life member of NorCCRA and resident at Carolina Meadows who will speak on “Electric Cars: Are We Being Taken for a Ride”, and Helen Mack, a member of the national AARP Volunteer Facilitating and Training Team, who will discuss fraud and scams primarily impacting the elderly.

MORE INFORMATION? GO TO page 4

Report Annual Board of Directors Meeting

The annual Board of Directors meeting was held June 4 by Zoom with 39 attendees. A proposed Bylaw change was voted to be presented for approval by the membership at the annual meeting. The bylaw change will allow digital format for all meetings.

A second Board decision will save NorCCRA over \$1000 per year. It was agreed that printed copies of *The Hotline* is a perk of membership. Hence, the number of printed

copies to a CCRC would be limited to the number of members plus approximately 20 for marketing purposes. Non-members are welcome to read *The Hotline* and can download a copy from NorCCRA’s website <https://www.norccra.org/hotline-newsletter-archive.html>, or the community representative can reproduce copies locally if they so wish. Many members, for reasons of environmental stewardship and cost already receive electronic instead of print copies.

After some discussion, the Board approved a proposal by Virgil Torbert to add to the duties of

Continued p8

See page 4 regarding Annual Meeting Registration and Proposed By-Law Changes p8

President's Message.....*from John Olmstead*

Many of the COVID19 restrictions from the past 15 months have been lifted. That is refreshing news, but unfortunately, many Americans have not availed themselves of the available vaccines, and the COVID death spiral not only continues, but is worsening in many States, including North Carolina. Shame on us/them.



As you likely know, NorCCRA is the only North Carolina organization that focuses exclusively on the interests of Continuing Care Retirement Community (CCRC) residents, and monitors strict state rules and regulations concerning each CCRC's financial viability. We are an organization staffed by all volunteers, and for our continuing viability, we need people to fill leadership roles with members that understand what is required in these positions. Accordingly, we have developed job descriptions for each of these important positions. Each CCRC Community Representative has access to these position descriptions. In addition to traditional administrators (President, Vice President, Secretary and Treasurer at both the statewide and 3 regional levels), we have a need for Legislative Affairs (lobbyist), Communications, and Special Projects volunteer personnel. Training and advancement opportunities are available for most positions. Current NorCCRA leaders are always seeking qualified volunteers to better our organization. Please contact your community representative, or any of the State Officers listed on the NorCCRA website (<https://norccra.org>), which is an excellent source of information about the organization.

For the past four years, several NC CCRCs, with permission and support from their administration, helped collect NorCCRA dues. In this scenario, all independent living residents who are not NorCCRA Life Members were notified that NorCCRA annual membership dues were to be included on their October bill each year. To opt out, residents had to notify the business office that they are not interested in being a NorCCRA member. This process helps NorCCRA increase membership; reduce the number of membership checks, and leveling annual cash flow. If you are interested in paying annual NorCCRA membership dues in this manner, please contact your community representative.

One of the initiatives NorCCRA has undertaken this year is the archiving of over 30 years of information and records that have been accumulated and passed on to each new president. The initial "downsizing" reduced the several hundred pounds of documents to less than a hundred pounds. A group of five Executive Committee

LEGISLATIVE UPDATE

.... from *Sindy Barker*

At the time the Hotline went to print, members of the House of Representatives were still finalizing the House Budget Bill. As soon as we have information on the sales tax provision, it will be posted on the website and sent to NorCCRA representatives and RA

presidents. See the report given at the June Board of Directors meeting on page nine. Also, there will hopefully be some information to share at the October annual meeting.



GRACE RIDGE RECOGNIZES STAFF

The Resident Association Board of Directors at Grace Ridge in Morganton had been racking their brains on how to recognize Staff who have given so much during the Covid-19 pandemic. After many months of brainstorming, they finally came upon a plan which they wanted to share with other CCRCs.

Administration was planning a potluck with Management providing the main course and Residents and Staff bringing sides and desserts. The Board decided to piggyback on that event and put out a secret (residents only) request to raise money for a newspaper ad “thanking the hard working employees that have given the best care during the pandemic”. Fortunately, Grace Ridge is owned by the local hospital, Carolinas HealthCare – Blue Ridge (now part of the UNC system) and they got all the employees names for the full page ad in the local newspaper without local Management knowing the plan. That full page ad ran the day of the potluck. The second part of the plan was a 20 x 4-foot vinyl banner saying “Grace Ridge Residents Thank Their Caring

Staff” which was hung on a third-floor apartment balcony overlooking the event. Management was so pleased with the banner that they later moved it to ground level facing the street. The secret fundraising was so successful they had enough money to also buy the entrees for the potluck so Dining Services did not have to work preparing the main course. Any excess from the residents fundraising will either be used to provide food for their next Staff/Resident party or it will be added to the Employees Christmas Fund.

The Residents Association Board has received many thanks from the staff and amazement from Administration that they were able to pull this off without anyone in Administration or on staff knowing about it. It was a wonderful opportunity to let not only staff but also the greater community of Burke County know how much the staff is treasured and appreciated.

Thanks to Gray Riddick for this article. For more information he can be reached at 828-391-5059

“Long ago, when men cursed and beat the ground with sticks, it was called witchcraft.
Today it’s called golf.”

Will Rogers

**North Carolina Continuing Care
Residents Association
Annual Meeting
Well Spring Retirement Community
October 12, 2021**



General Session Agenda

9:00 – 9:30 AM Attendees Refreshments, Socialization and Seats

9:30 AM Call to Order, Moment of Silence, Pledge of Allegiance

•**Welcome, Acknowledgements and Comments** John Olmstead, President

9:45 AM Introduction of Speaker John Olmstead, President

Tony Butterworth, a Carolina Meadows resident, provides an informative and entertaining talk on how the automobile industry is changing, and the implications for people our age. He calls the talk "Electric cars: Are We Being Taken for a Ride."

10:45 AM Short Stretch / Rest Room Break

11:00 AM Introduction of Speaker John Olmstead - President

Helen Mack is a member of the national AARP Volunteer Facilitating and Training Team, and her duties include traveling to work with states concerning AARP national and state initiatives. She has received the Andrus award from NC-AARP for Community Service, and serves on the NC-AARP Executive Council. She will discuss fraud and scams primarily impacting the elderly.

Approx. 12:00 – Lunch Break

Business Session Agenda

12:30 - Call to Order – Quorum – Approval of Minutes of Oct 6, 2020 Annual Meeting

Budget Report/ Adoption of 2021 - 2022 Budget Skip Kingan – Treasurer

Communications Report Margaret Zircher, Communications Director

Legislative Report Sindy Barker, Chair Legislative Committee

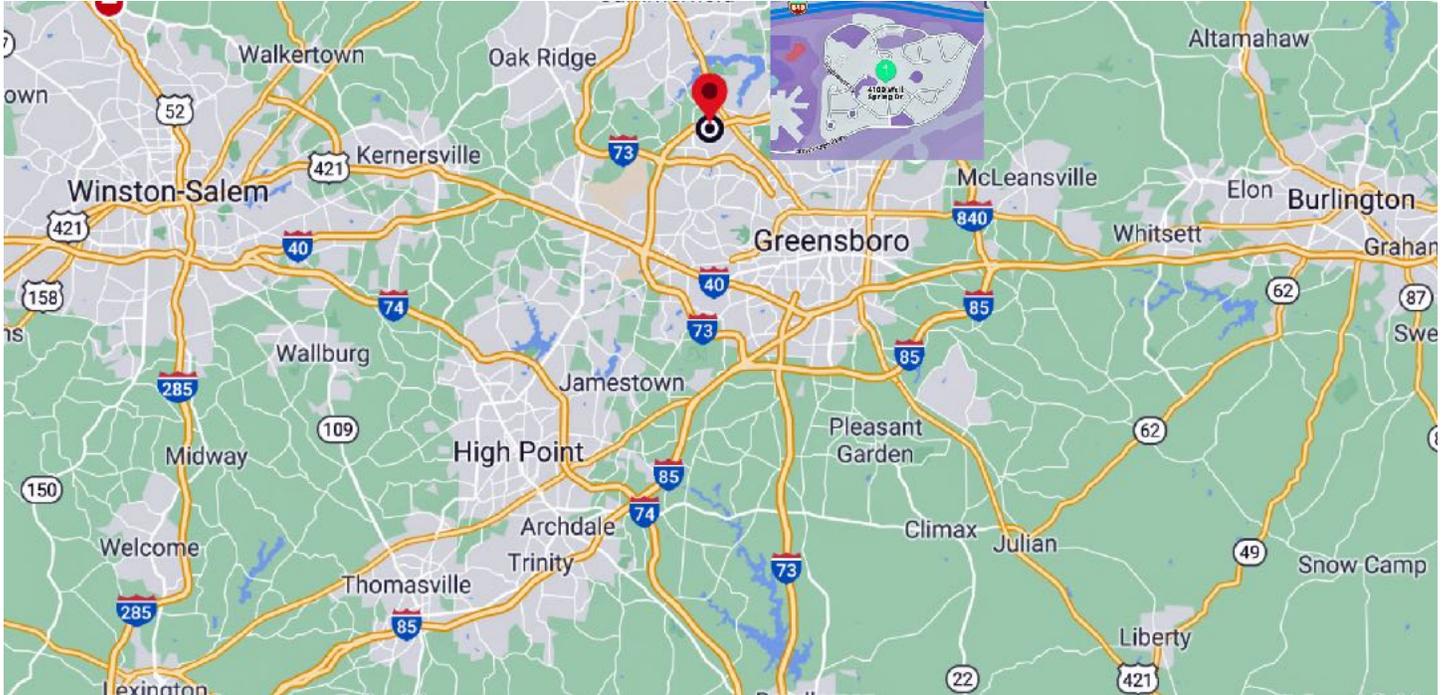
Ratification of Bylaws Amendment Affirmative vote by a majority of members

New Business Anyone?

Election of Officers (Floor Nominations?) Affirmative vote by a majority of members

Installation of Elected Officers Clint Willis – Past President

Appointment of Region Leaders, Directors and Committee Chairs President



For directions, go to <https://www.google.com/maps/dir//well-spring+retirement+community/@36.2049475,-80.522892,8.9z/data=!4m8!4m7!1m0!1m5!1m1!1s0x88531cff82678419:0x417fd7a23ba0bbf5!2m2!1d-79.8749741!2d36.1342661>



I (we) are vaccinated! and will bring masks!

Please register me (us) for the NorCCRA Annual Meeting, October 12

Name(s) (Please Print) _____

CCRC Community _____ email or phone _____

I (we) have the following dietary restrictions:

Please check the appropriate registration blank:

_____ **Member NorCCRA** **Cost \$15 for registration and lunch**

_____ **Non-member** **Cost \$18 for registration and lunch**

Mail this form and check made payable to NorCCRA to:
Susan Rhyne, 3913 Muhlenberg Court, Burlington NC 27215

RESERVATIONS MUST BE RECEIVED BY TUESDAY, OCTOBER 5

2021-22 Proposed NorCCRA Officers

Article V, Section 2 b&c of NorCCRA's bylaws state "The Nominating Committee, having secured the consent of the nominees, shall submit a list of candidates to the President at least 30 days prior to the Annual Meeting. Further nominations, upon the prior consent of those being nominated, may be made from the floor at the time of the election." Officers to be elected are President, Vice-President, Secretary & Treasurer.

For President: John Olmstead, Scotia Village

John and his wife Martha have resided at Scotia Village in Laurinburg for the past seven years. He has served four years as their Residents' Association Vice President and President, and has previously served as NorCCRA's Vice President, NorCCRA Eastern Region Chair, and was a Scotia Village NorCCRA representative for 5 years. This will be John's second year as NorCCRA's President.



John is retired military, having served 36 years in the US Navy. He has a MS degree in Aerospace Engineering, a BS in Mechanical Engineering, and was a Navy experimental test pilot for six years. He served four years as the Department of Defense (DoD) Unmanned Aerial Vehicle Program Manager, and served four years as Military Executive Director for Naval Aviation Engineering Operations. He was immediately recalled from statutory retirement by the Secretary of the Navy to continue in this role an additional year. After military retirement, he continued contract work for 21+ years as a Senior Systems Engineer with DoD and the Navy, ending in 2018. In civilian life, his responsibilities included 6 years as Chair of the Montgomery County NC Planning Board; 18 years as Director and President of a non-profit HOA; 6 years as a Presbyterian Church Elder; and 6 years as a Governor appointed Director and Treasurer of the Community Resource Council at the NC prison in Troy NC. John and Martha have 3 adult children living in Maryland, Michigan and California, and 6 adult grandchildren.

For Vice President: Charles (Skip) Kingan, Croasdaile Village

Skip served this past year as NorCCRA's Treasurer, and is now nominated for the role of Vice President. He has been married to his wife Jeanne for almost 53 years and resides at Croasdaile Village along with their spoiled miniature poodle Cooper. Skip is a native of Pittsburgh, PA and met Jeanne in junior high school in Houston, Texas after his father was transferred. He is a graduate of The University of Texas at Arlington with a BBA in Accounting.



Skip retired from Liggett Vector Brands LLC in 2015 as Senior Vice President of Operations and Finance in Mebane, North Carolina. He began his career with Liggett as the Financial Director for the Western Division in Dallas, Texas. In 2000 he moved to Durham to become the Chief Financial Officer in Liggett's corporate headquarters. In 2010 Skip became Senior Vice President with operational and financial responsibilities. He was also a member of the board of directors when he retired.

Skip started his career as a CPA with a regional accounting firm in Fort Worth Texas, specializing in audit and taxation of financial institutions. After eight years in the CPA practice, he was recruited by one of his clients to become their Controller. Skip served as an officer in several banks

2022 Officer Nominees, cont'd from p6

throughout the southwest, the last of which he was as President. Skip has served on planning and development committees of the Chamber of Commerce in both Texas and Oklahoma. He has served as President of the Financial Managers Associations of Oklahoma and Texas, and also served as Campaign Chairman and then President of the United Way in Central Texas.

For Secretary: Carolina Filbert, SearStone

Caroline was born and raised in Wilmington DE. Secondary education was completed at the Delaware Hospital School of Nursing. She worked in Woodbury NJ as a nursing unit manager for 35 years. The major accomplishment of this tenure was the creation and management of an oncology unit and outpatient oncology service.



Caroline and her husband Bill moved to Cary to be closer to their daughter and family. Caroline worked another 10 years as a surgical unit nurse in Raleigh. After moving into SearStone during their opening month, Caroline has served on various resident association committees and completed four years as the association secretary/treasurer. This will be Caroline's second year as NorCCRA's secretary.

For Treasurer: Joe Liegl, Carolina Meadows

Joe is a native of Wisconsin. His undergraduate and law degrees are from the University of Wisconsin-Madison. After spending a short time at a small Wisconsin law firm, Joe went to the US Department of Justice in Washington DC for four years, where he began his career as a tax lawyer. He then went to the Cleveland office of a major law firm (Jones Day) for over 17 years, and then to the Detroit office of a major accounting firm (Coopers & Lybrand) for a few years. He finished his career by working 15 years for the major management consulting firm, McKinsey & Company, mainly in New York, and then by telecommuting from his home in the Chapel Hill area. He retired in 2013.



Joe served on the board of trustees of a church during his years in New York. Since retiring, he has been treasurer for three different non-profits in the Chapel Hill area. Joe was also on the board of the Inter-Faith Council for Social Service (IFC), which has long served the food insecure and those experiencing homelessness in the Chapel Hill area. Joe served as the secretary, treasurer, vice president, president, and immediate past president of the IFC board in his two terms on the board. He was also on the finance and executive committees of the IFC board for over four years. Joe is now on the

bylaws committee of the residents' association at Carolina Meadows and is secretary of his precinct there.

All of us have been lucky at many times in our lives. Among Joe's luckiest experiences have been his 47 year marriage to his wife, Jan, and the birth of their two sons, who live with their families (including Joe's three grandchildren) in NE Ohio and San Francisco.

◆ ◆ ◆

“You give but little when you give of your possessions. It is when you give of yourself that you truly give.” *Khalil Gibran*

PROPOSED AMENDMENT TO NorCCRA BYLAWS

Section 15 of the NorCCRA Standing Rules state “Any intent to amend the Bylaws shall include a notice of this intent in the notice for the Annual Meeting. With the notice, the full text of the proposed amendment document shall be provided to all Community Representatives who shall make this available for reading by members of their community by whatever means is convenient to them. This text shall include the sections of the existing Bylaws proposed for change together with the amendments thereto.”

The proposed amendment is reflected below in bold font. It was approved by the NorCCRA Board of Directors at their Annual Meeting on June 4, 2021. The complete Bylaws and Standing Rules may be viewed/printed from NorCCRA's website: <https://www.norccra.org/bylaws.html>.

Article VIII, Section 3, of the Bylaws currently states “The first meeting of a new Executive Committee shall be in person. Thereafter, meetings via teleconferencing shall be permitted subject to conditions established in the Standing Rules.” The proposed Bylaw wording states “**The first meeting of a new Executive Committee shall be in person if the Annual Meeting is in person. If the Annual Meeting is via teleconferencing, the first meeting of a new Executive Committee may be via teleconferencing, at the option of the President. Thereafter, meetings via teleconferencing shall be permitted subject to conditions established in the Standing Rules.”** Teleconferencing includes Zoom and other virtual media”.

The general membership must approve Bylaw changes by majority vote of those present and voting.

Board of Directors Meeting, cont'd from p 1

community representatives to survey their community and determine if there are residents who have the qualifications and interest in serving in leadership positions in NorCCRA.

Treasurer Charles (Skip) Kingan gave a treasurers report, pointing out that even though revenues in 2021 were below budget, so were expenses. NorCCRA's finances remain strong.

Susan Rhyne reported that the total current membership is 4327, of which 1428 are annual and 2899 are life memberships. Community representatives are asked to report any member deaths to Susan ASAP. She does a required quarterly audit report of membership.

Margaret Zircher reported that the new membership brochures will be distributed at the annual meeting in October; the revised website is now online; and NorCCRA's new webmaster, Gloria Nicholson has settled into her role quickly.

[continued p 9](#)

Board of Directors Meeting, cont'd from p 8

Regional reports included

- Gay Eddy who reported that the recent Eastern Region Meeting was a big success. Carol Woods will host next year's meeting.
- David Teal reported that he is working on getting reps at all Central Region communities and working on a community membership campaign with Jamie King at Trinity Oaks.
- Bob Osborn has been working to increase interest in NorCCRA in the Western Region. Thirty-three from the Western Region registered for the Eastern Region meeting in April, excluding any that streamed the meeting into their auditorium for interested residents.

Sindy Barker gave an update on legislative activities, which centered around Senate Bill 495, proposing a 2% sales tax on raw food (called a grocery tax) consumed by residents in independent living. It would not apply to residents in higher levels of care. This is a compromise to what was originally sought by the Department of Revenue's 7.5% sales tax on monthly fee, such as the one imposed on the Cypress of Charlotte in 2020. NorCCRA and LeadingAge are working together to get this more manageable 2% tax on raw food rather than tax CCRCs as a business. Sindy announced a NorCCRA/LeadingAge Zoom meeting that was held in June to update all CCRC resident leaders and management on current status of the bill.



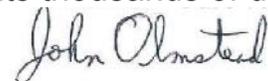
President's Message cont'd from p2

Members further reviewed, sorted, separated and disposed of more than half of those documents. The final steps will be to categorize and digitize the documents for secure and readily accessible storage.

For the first time since pre-COVID, NorCCRA will host its annual meeting and election at an in-person venue at Well-Spring Retirement Community in Greensboro. This is an excellent chance to socialize, learn about, and question others with similar life circumstances. The meeting begins at 9:30 AM on Tuesday, October 12th. PLEASE MARK YOUR CALENDARS.

Scams and scammers are alive and active. They are also becoming common on cell phones. This week (in mid-July) I received two different cell phone calls purportedly from the Social Security Administration. They both announced that my Social Security Number had been cancelled, and that I needed to call a number in order to reactivate the account and my benefits. I blocked the caller of the first call, and received a 2nd call three days later, which I also blocked. Although the displayed called from numbers were different, they both allegedly originated from Fayetteville, NC

Thank you for being NorCCRA members. Without the 4500 of you, we would not be able to stand up for the 22,000+ NC CCRC residents. We represent a large voting bloc in NC, and over the past few years have saved most CCRC residents thousands of dollars.





What's on Your Bucket List?

When it comes to planning things for the future, some ideas rapidly dissipate like New Year's resolutions. Others just hang around for years like this one on Joy Pierce Herrington's bucket list that has to do with fossils.

often very detailed, teach about changes in the earth's climate and environment around 50 million years ago.

Joy describes her first trip where unmarked trails across the desert led to surface rock exposures. Parking at the collecting site spared the long trek with heavy tools required in most areas. Using hammers and chisels to separate thin layers of sedimentary shale worked well. Splitting rocks in full sun is an ancient form of torture but hobbyist, like dedicated athletes, are accustomed to pushing through harsh physical

demands. Still, after a few hours of splitting rocks in such hot sun and feeling toasted both below and above, eager for relief, Joy moved on. The second trip was cut even shorter. She met another demon, the unpredictable 'gnat' invasion. Protective garments, netting, and chemical repellents couldn't save her. Again, she moved on. "Cowboy Canyon, your fossils make me wish for another try!" exclaims Joy.



Collecting fossils is her hobby. All of the fossils on the table in the photograph are from North Carolina. Many specimens in her fossil room at SearStone Retirement Community are - but there are also fossils from trips to other areas.

Thanks to Joy Pierce Herrington, (joy.herrington@outlook.com) resident at SearStone Retirement Community, Cary, NC for this article.



Leaves of balloon plant, *Cardiospermum coloradensis*, and a robber fly from the Asilidae family.

There have been two trips to Cowboy Canyon, Utah, to find deposits of Green River Formation shale that hold delicate evidence of plants and insects. These life forms, dark brown on tan and

If you travel and might like to be a fossil collector but are inexperienced, you might visit one of the commercial fossil quarries that supply all tools and give instructions. Usually you keep your finds. Fossil fish sites are located around Kemmerer, Wyoming and U-Dig Trilobites in Delta, Utah is full of fossils. Getting there can be a real adventure but quarries are productive and safe for children.

Florida CCRC Installs Solar Panels Thanks to a Resident Led Project

Oak Hammock at the University of Florida in Gainesville started installing 682 bifacial solar panels in July that will generate solar power for two buildings, which is about 5% of the community's total usage. It is the first CCRC in Florida to shift toward sustainable energy. "It's both good for the environment and it's good for our internal economics here," said John Paul, one of the residents involved with the project. Bill Rossi, one of the engineers and residents, said other communities and individuals need to rethink how they impact the environment to be sustainable.

Oak Hammock residents are environmentally conscious. The community has banned styrofoam on campus, and replaced 90% of light bulbs with LEDs. In 2017 the residents formed a committee to bring solar energy to the community. The project was originally proposed twelve years earlier by the late Lee Bidgood, a chemical engineer and resident who was dedicated to environmental stewardship. Nelson Logan, a resident on the project said it didn't come to fruition without setbacks, one of which was to convince the local utility to let Oak Hammock tap into the power grid. "This is a thirty year warranty kind of project, and most of us will be gone, but others will benefit from it and the planet will benefit from it" said Logan.

The expectation is that over time the solar panels will show a 9% return on investment. The project cost is \$603,000, Oak Hammock's

current energy bill is around \$1 million, and the solar panels which have a 25-30 year life span should save \$50,000 per year, with a break even in 8 years. It is expected the savings will go up in time. Rossi proposed the project to the finance committee of the Oak Hammock Board of Directors in October 2019. John Paul, one of the engineers and residents said the collaboration of both the Oak Hammock community and the management made the project possible.

By making a business case for the project, the management was more willing to listen.

Rossi said that a lot of people talk about renewable energy and using some wind or water to generate electricity rather than

coal fired plants, but Rossi is proud that Oak Hammock has done something about it. He thinks this is one of the best investments that Oak Hammock has ever made. Each member of the team signed their name on the first panel that went up, to leave their mark. Logan, Paul and Rossi shook hands with each other as they watched the first panel being installed. "Failure can be done alone, but success requires a team, and we had a very good team," said Logan.



For more information contact

Nelson Logan

nelson.logan@me.com



A Letter from *Your Editor*

This will be your last *Hotline* with me as your editor since I am “retiring” as of the October Annual Meeting. It has been my pleasure to serve on the Executive Committee and/or as Communications Director for 5 of the past 6 years. Whoever takes over Communications Director will become a member of a competent, well functioning Executive Committee, with whom it has been a privilege to be affiliated.

When I assumed full responsibility for the Hotline (as opposed to oversight as a VP), I’d had no previous experience in publishing a newsletter or using software to accomplish the task. Other than English composition classes in college, for which I now wish I had paid more attention, I had no experience in writing, and never saw myself as having any skill in it. I’m no computer whiz either, but could muddle thru using one. However, I survived, and grew, and had the pleasure of making a contribution to an organization I think has an important mission for those of us living in CCRCs. If you would like to explore the possibility of experiencing such satisfaction, or assuming the role of communications for NorCCRA, contact John Olmstead (olmsteaj@erols.com) or me (zircher@me.com.)

Whether or not you receive another *Hotline* depends on ONE OF YOU! As of this writing, no one has volunteered to take over as Communications Director. I am willing to train my replacement in whatever way needed as responsibilities and records are turned over.

As a member of the archives team in June, I perused thru years of old editions of *The Hotline*, becoming keenly aware that good communications are critical to the success and survival of an organization, and that there have been some outstanding editors in past years. I’m confident that someone in our membership can do an outstanding job— certainly better than I have. And I believe that it is healthy for an organization to have “fresh blood” in its leadership every now and then. So after five years, and with a strong Executive Committee, I say it’s time for someone else to take over communications. But... I do hope this is not NorCCRA’s last newsletter.

Want to stay “young” and add some satisfaction and meaningfulness to your life? Volunteer!

Margaret Zircher



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. Give your check and application to your local NorCCRA rep.

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

Thank you.