



The Hotline

North Carolina Continuing Care Residents Association

www.norccra.org

The NorCCRA Annual Membership Meeting will be held at Trinity Oaks Retirement Community 728 Klumac Road, Salisbury, NC 28144

Trinity Oaks Retirement Community will host The NorCCRA Annual Membership Meeting On Tuesday, October 10, 2023. This is our first in person annual membership meeting since October 2019. Our speakers will address the various Medicare programs and provide insight and perspective on the future of medical care for seniors.



Gina Upchurch is the founder and Executive Director of Senior PharmAssist, a nonprofit organization that assists older adults with obtaining and managing medication and provides Medicare benefits counseling and tailored community referrals in Durham, NC. She is a registered pharmacist and has participated in various committees at the state and federal level, such as the American Geriatrics Society Public Policy Committee and several working groups to the NC Institute of Medicine. Gina received her bachelor's and master's degrees in Pharmacy and Public Health from University of North Carolina at Chapel Hill. She has just been appointed by the Comptroller General of the US to the Medicare Payment Advisory Committee (MedPAC).



Dr. Jonathan Kotch, a board-certified medical specialist in pediatrics and preventive medicine, retired in 2016 after 38 years on the faculty of the Department of Maternal and Child Health of the UNC Gillings School of Global Public Health. His research expertise focused on health and safety in out-of-home child care and longitudinal studies of child abuse and neglect. His advocacy activities include 14 years as president of Health Care for All NC, a chapter of Physicians for a National Health Program, and North Carolinians against Gun Violence. As a 5 year resident of Carolina Meadows, he served as the chair of the Residents' Health and Wellness Committee during the height of the COVID-19 epidemic, and currently is chair of the Residents' Environmental Sustainability Committee which he helped found in January, 2023. He will speak to us about his perspective on current and future medical care for seniors in US.

Annual Meeting registration information on page 2, Annual Meeting agenda on page 5, list of nominees for 2023-2024 officers on page 6.

September 2023



The Hotline

NorCCRA Annual Meeting

All NorCCRA members are invited to attend this in-person meeting

When: Tuesday, October 10, 2023

Starting at 9:15 AM. Expect adjournment by 2:00

Where: Trinity Oaks Retirement Community

728 Klumac Road, Salisbury NC 28144

Registered members attending the meeting in person will receive a box lunch compliments of Trinity Oaks. Lunch choices are Ham, Turkey and Vegetarian sandwich.

Please wear your home name tag (home CCRC and your name)

To Register for the meeting
email your name, email address, community and Lunch choice preference to allenkannapolis@aol.com

Registration ends Tuesday, September 26, 2023



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President's Message from Skip



From my earliest memories, I have always looked forward to summer. That three-month period where our youthful and somewhat creative minds allowed us to think we were completely free of any adult controls and could roam and do as we pleased. Little did we know that every parent in the neighborhood compared notes and usually had a complete itinerary of our adventures before dinner.

We especially looked forward to that week or two called vacation. Sometimes, the whole family packed up and went on a trip to the seashore, the mountains, or foreign countries like Florida and Oklahoma.

But we all knew that summer would end, and school would once again demand our full attention. During the first week of school there was always that dreaded assignment, write an essay on "What I Did this Summer!" Some years were easy. I wrote about the 29-inch Muskie I caught in Canada or the summer I learned to waterski in Deep Creek, Maryland or the summer my idol, Smokey Burgess, the catcher for the Pittsburgh Pirates gave me his catcher's mitt. Then there were the summers filled with baseball, swimming, etc., fun, but not memorable enough to write. Which brings me to "How did I Spend the Summer of 2023:.

This essay has neither a good nor a bad ending. As of today, it is unfinished. What I did this summer was to attend numerous meetings with the Department of Insurance, NC Senators and Representatives and their staffs, attended four Senate committee meetings, and the Senate session where the proposed CCRC Statute S145 was passed. See the legislative report on the following page for more information about both the sales tax exemption and the proposed CCRC Statute S145.

While the legislative agenda has consumed a lot of time for Sindy, Martha and me, others have been working on important projects. Margaret Zircher has been putting together a couple of Google docs to help us maintain our lists of directors and CCRC residence council presidents and working on an electronic file to house NorCCRA archives. Sharon Everhart has been diligently working to provide knowledgeable and relevant speakers to the Annual Membership meeting in October.

The Nominating Committee (John Olmstead, Bob Osborn, David Teal and Art Cooper) have completed their work and presented me with their nominees as required by our by-laws. The Nominees and are listed on 6.

Bill Lambe has undertaken the task of revising the NorCCRA "Standing Rules" and "By-laws" to bring them into conformity with current rules and operations. The Standing Rules were approved at the June Board of Directors meeting and are now posted on the NorCCRA website. The changes to the By-laws are as follows;

Continued on page 7 —>

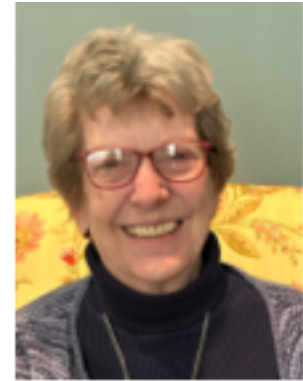


The Hotline

Legislative Update *from Cindy and Martha*



Unfortunately, we have no updates since the June report. The General Assembly essentially took a six-week break beginning the first of July. As of now, we expect the legislature to reconvene on August 15.



At a press conference in early August, House Speaker Tim Moore forecasted a “zero” chance that a final budget would become law before September 1. “Just with some absences I know that the Senate has on their side, and with just some of the logistics that have been talked about ... you’re talking about a September date for actual passage – signing (the bill) into law and all that.” Moore said.

Initially, plans were to enact the budget by July 1, which is the beginning of the State’s fiscal year. The House passed their budget in early April; the Senate passed their budget in mid-May. The House rejected the Senate’s version on May 26. A conference committee was appointed in early June and has worked during the summer months trying to reach a compromise.

In addition to voting on the budget, both houses need full representation by Republicans to override the five pieces of legislation vetoed by Governor Roy Cooper. Senate Republicans have a supermajority with 30 out of 50 seats. The House gained a supermajority in March when Representative Trish Cotham switched to the Republican party. Since then, the Governor’s veto has been overridden ten times. Representative Moore and Senator Berger are counting their votes to determine when a bill will be taken up for override.

What does this mean for NorCCRA’s legislative initiatives?

Because of the budget impasse, legislation that passed one house is being held by the Rules Committee in the other house. This applies to **S145, Continuing Care Retirement Communities**. After a busy June the bill passed three Senate committees and the full Senate on June 28. It was sent by special messenger to the House and has remained in the House Rules Committee since then. continued on pg. 7 —>

September 2023



The Hotline

**North Carolina Continuing Care Residents Association
Annual Meeting
Trinity Oaks Retirement Community
October 10, 2023**

General Session Agenda

- 8:15 – 9:00 AM** Check-in, Refreshments, Socialization and Seats
- 9:00 AM** Welcome Bill Johnson, Executive Director, Trinity Oaks
- 9:10 AM** Invocation Jill King, Pastor, Trinity Oaks
- 9:15 AM** Meeting Called to Order
- Welcome, Acknowledgements and Comments Skip Kingan, President
- 9:30 AM** Introduction of 1st speaker Sharon Everhart, Vice President
Ms. Gina Upchurch, registered pharmacist and a member of Medicare Payment
Advisory Committee (MedPac)
- 10:30 AM** Short Break
- 10:45 AM** Introduction of 2nd speaker Sharon Everhart
Dr. Jonathan Kotch, board-certified specialist in pediatrics and preventive medicine
- Approx. 11:45** – Lunch (Compliments of Trinity Oaks Residential Community)
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Business Session Agenda

- Approx. 12:30 - Call to Order** – Quorum Skip Kingan
- Approval of Minutes of Oct , 2022 Annual Meeting**
- Budget Report/ Adoption of 2023 - 2024 Budget** Joe Liegl – Treasurer
- Legislative Report** Sindy Barker, Chair Legislative Committee
- By-Laws Updates** Bill Lambe - Presidential Appointee
- New Business**
- Nominating Committee Report / Floor Nominations** John Olmstead – Past President
- Election of Officers** - Affirmative vote by a majority of members
- Installation of Elected Officers** John Olmstead – Past President



The Hotline

NorCCRA Officer Nominees for 2023-2024



For President: Charles "Skip" Kingan
Skip has been a member of NorCCRA since moving to Croasdaile Village in 2019. The Croasdaile Village residents elected him to the Croasdaile Village Residents Council as the Croasdaile Village NorCCRA Representative. Skip was nominated and elected to the office of NorCCRA Treasurer at the annual meeting in October 2020 and became Vice President in October 2021. In October 2022, Skip was elected to lead NorCCRA as President.



For Vice President: Joseph "Joe" Liegl
Joe's undergraduate and law degrees are from the University of Wisconsin-Madison. After a short time at a small Wisconsin law firm, Joe went to the US Department of Justice in Washington DC, where he spent four years as a tax lawyer doing tax litigation for the government. He finished his career spending 15 years for a management consulting firm in New York. Joe has been treasurer for NorCCRA for the last two years.



For Secretary: Margaret Riley
Margaret retired from Duke in 2013 as director of study abroad as well as associate dean and assistant vice provost. Previously she held similar positions at Western Michigan University and at St. Norbert College. She was involved with OLLI at Duke as a board member, instructor, and volunteer. Currently she is an avid filmgoer and active in several card groups. She was first elected NorCCRA Secretary in 2022.



For Treasurer: Bob Osborn
Bob has a BS in Industrial Management and had a 40 year career in Information Technology with 4 multinational corporations. He has been a volunteer tax preparer with the AARP Tax-Aide program and a church elder and committee chair on the Finance and Endowment committees. He served as Treasurer of The Pines Residents Association and served on the NorCCRA task force for the proposed CCRC legislation. He has served as the NorCCRA Western Region leader for the past 2 years.



The Hotline

President's message, continued

ARTICLE I - Name and Location

Change the corporate address to reflect the address listed with the North Carolina Secretary of State.

ARTICLE VIII - Executive Committee

Section 2. Powers

The change is to eliminate the second half of the paragraph, which is an exact duplicate of the first half.

Section 3. Meetings

The Executive Committee shall meet at the call of the President. Five members shall constitute a quorum. All actions shall require the approval of a majority of those members eligible to vote present and voting unless restricted by other provisions within these bylaws. The first meeting of a new Executive Committee may be via teleconferencing or in person, at the option of the President. Teleconferencing includes Zoom and other virtual media.

ARTICLE X - REGIONS

Section 3. Officers

Section 5. Finances

The changes to both Section 3 and 5 conform to the eliminations of treasurers in the Regions.

The proposed changes to the By-laws will be voted on at the October meeting.

This will be Jamie King's last edition of *The Hotline*. Jamie jumped in as *Hotline* Editor over two years ago and has consistently published interesting and informative articles related to CCRC residents across the state. Trinity Oaks, where Jamie resides, will be hosting the Annual Membership meeting on October 10, 2023. When you attend the meeting, be sure to thank Jamie for the job he has done.

I hope to see everyone in October.

Skip Kingan

Legislative Update, continued

We still have no word on the sales tax exemption in the budget negotiations. Since it was in the House budget, but not in the Senate version, it remains one of the items the two houses will need to reach agreement on. Other items include Medicaid expansion, teachers' salaries, casinos built outside of tribal lands, reduction in the individual income tax rate, and more.

If the Senate and House return to business on August 15, the budget conference committee may present a budget at that time. That will be the first opportunity to see if the sales tax exemption is included in the budget. It might also mean that the bills being held in Rules Committees will be assigned to committees for discussion.

We hope to know a lot more by the first of September.

Sindy and Martha

September 2023



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MEMBERSHIP NUMBERS MATTER

The 2023 session of the NC State Legislature will be especially important to you, because this year that there will be or won't be significant changes made affecting life in a CCRC. Membership allows your voice to be heard!

Politicians know for certain just two things: the first one is that their elected positions depend on voter numbers, and the other one is that seniors vote. Your membership helps get your message across.

The Hotline is published quarterly, March, June, September and December by the North Carolina Continuing Care Residents Association. Submissions and other Hotline-related communications should be addressed to the editor: Jamie King, Trinity Oaks, Salisbury, NC or kj4jk@arrl.net



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.

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