

THE HOTLINE

THE HOTLINE is published four times a year for the *Continuing Care Community Residents of North Carolina* (CCCR of NC), incorporated in 1988 "to further the interests of residents of continuing care residents communities in North Carolina.

Continuing Care Community **RESIDENTS** of North Carolina

DEFINING OUR FUTURE!

SHAPE THE VISION!

SHARE THE EXCITEMENT!

This year the Annual Meeting of CCCR of NC will not only be grounded in the present, but also will look to the future. Our world is changing and we are changing with it. The overall theme of the meeting will be "Defining Our Future" and will follow a somewhat different pattern from the last few years.

The meeting will be held in a Methodist Church building in Greensboro because our membership has outgrown the spaces available in CCRC's, and because Greensboro is a fairly central location. The meeting will begin at 10:30 AM on Thursday, October 21. The speaker in the morning session will be Jeanie Schepisi, a communication specialist from the North Carolina Department of Insurance. Her topic "Changes in Resident Health Care" will include valuable information on the Medicare program as it is now with a prescription drug service and as it is expected to change in the future. There will be time for questions.

Your registration will include a catered lunch. After lunch, we will present, explain and discuss the recommendations made by a Planning Task Group that during the summer took a fresh look at CCCR of NC. The group asked itself several probing questions. What is our mission? Who do we serve? What do CCRC residents value? How is our situation changing from what it has been in the past decade? How can we build on our unique strengths? What organizational changes will best enable us to serve the interests of CCRC residents in the future?

The report of this group has been shared with the Executive Committee and in September will be sent to the full Board of Directors. By early October these groups will have added their suggestions, ideas and insights. Then, assuming we have a consensus on the general directions and recommendations, it will come to the full membership at the Annual Meeting. There we will invite additional reflections, suggestions and ideas for improvement and implementation. Finally, we will have our business meeting, at which time we will elect new officers and adopt a budget for the 2004/2005 fiscal year. This will be a very important meeting and you will want to be present!

THE HOTLINE

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CCCR of NC and NCANPHA MEETING

CCCR of NC representatives Don Hasty, Sterling Whitener and Myles Walburn met with NCANPHA representatives Susan Williamson, Steve Fishler and Bill Pleasants at Friends Home West in Greensboro for two hours on May 5th, 2004. Also attending was Ken Partin, CEO of Givens Estate, who will be replacing Bill Pleasants as Chairman of NCANPHA. We had not met since January 23 because schedule conflicts made it very difficult to find a date acceptable to all.

We began by expressing our hopes and expectations for the frequency and content of meetings. It was agreed that these meetings should be viewed as scheduled and regular rather than "ad hoc". We pledged to hold at least two meetings a year with the expectation that additional meetings would be called as justified by the agenda topics that emerge from our discussions.

We shared with NCANPHA members a suggestion for legislative change we received from Twin Lakes residents. This led to a discussion about changes in the law and how our two groups approach public policy issues. Since CCCR of NC doesn't have a stated policy or guidelines to review in determining whether to

recommend legislative action, this topic was identified for thorough discussion at our next meeting.

The group again picked up the topic of improving financial disclosure in those communities where residents are not receiving answers to their questions. NCANPHA reported that at a forthcoming meeting Jeff Trendel will describe the legal requirements that were placed in the law last year and also review the expectations of the Department of Insurance for the bi-annual financial reporting by CCRC's (see p. 5).

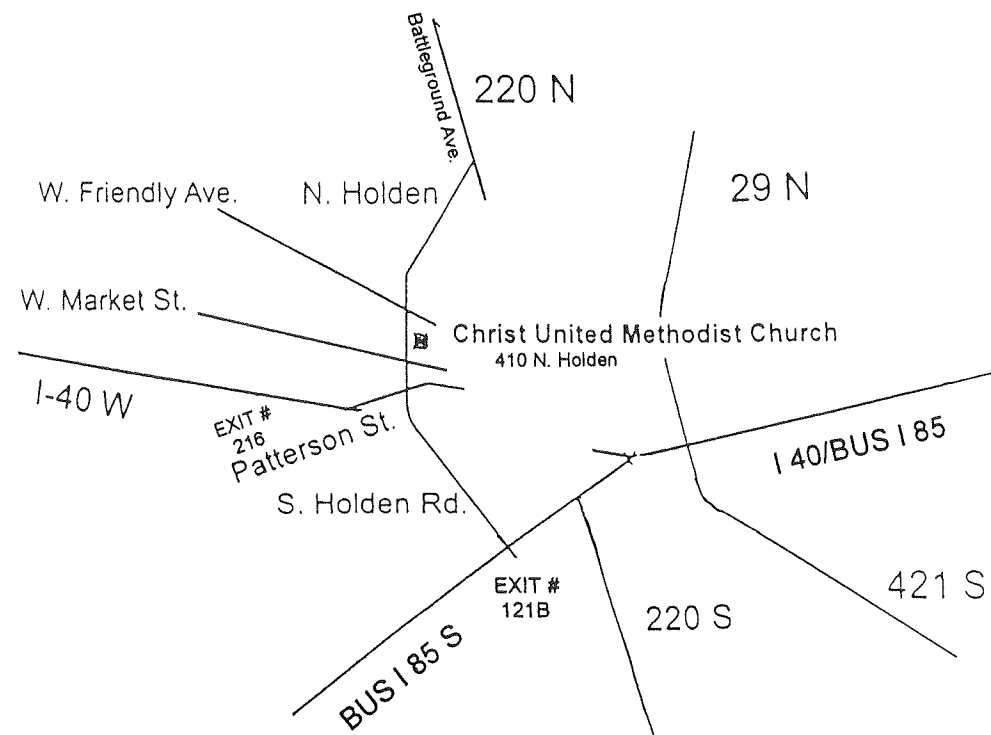
NCANPHA is planning a conference of chief financial officers that will be held in August. They will work on the design of a survey instrument to gather statewide financial information that can be compiled to arrive at operational benchmarks. Such information already exists in other states. If the design phase can be completed in 2004 and data gathered in 2005, it is hoped the analysis and report will be available in 2006.

Conversation turned to issues that may emerge in the short session of the North Carolina legislature. Susan reported that the purpose of the session is primarily to refine the state budget. Since tax revenues have been good the emphasis will probably be on realignment of some budgeted funds. NCANPHA will be working to insure that funds now designated for programs in aging are not diminished. It is also possible that the medical liability issue may again emerge.

Our next meeting is planned for August 6, 2004 and will be held at the Riverlanding in Colfax, NC

Myles Walburn
Carolina Meadows

Directions to Christ United Methodist Church,
410 N. Holden Rd., Greensboro tel. 336/299-5006:



From the east, north east, south east, enter Greensboro on I 40/BUS I 85, follow BUS I 85, turn off at exit 121B to Holden Rd. Turn right and follow Holden Rd. north to Christ UM Church on the right between Market St. and Friendly Ave.

From the west on I 40, turn off at exit 218, follow Patterson St. (NC 6) to intersection with Holden Rd. Turn left and follow Holden Rd. south past intersection with Friendly Ave. The Church will be on your left.

From the north on US 220, pass Lowe's then turn right at sign "to Holden Rd." Follow Holden Rd. south past intersection with Friendly Ave. The Church will be on your left.

From the south on US 220, turn left (toward Charlotte) on BUS I 85. Turn off at exit 121B to Holden Rd. Turn right and follow Holden Rd. south past intersection with Friendly Ave. The Church will be on your left.

From the south west, take BUS I 85 to turn off at exit 121B to Holden Rd. Turn left (-north) and follow Holden Rd south past intersection with Friendly Ave..The Church will be on your left.

Benefits of Aging

Ah, being young is beautiful, but being old is comfortable.

Old age is when former classmates are so gray and wrinkled and bald, they don't recognize you.

If you don't learn to laugh at trouble, you won't have anything to laugh at when you are old.

A distraught senior citizen phoned her doctor's office. "Is it true," she wanted to know, "that the medication you prescribed has to be taken for the rest of my life?" "Yes, I'm afraid so," the doctor told her. There was a moment of silence before the senior lady replied, "I'm wondering,

Scotia Village Board Meeting



Representatives and guests were greeted with bagpipe music upon arrival at the May 15th board meeting at Scotia Village. Once inside Sean Huyette, Executive Director, related that Scotia village is growing and being refurbished and as a result of their special arrangement with their neighbors, St. Andrews College they will have a ministerial intern program starting in July.

Don Hasty, President, reviewed actions from April 26th executive meeting. They included: 1. A review of IRS classification, we will remain a 501c4 organization which allows us to conduct lobbying. 2. A temporary committee of Frank Earnheart, Quentin Lindsey and Dan Knee has been appointed to consider what actions might be undertaken with the Department of Insurance in light of the ad hoc finance committee recommendations. 3. Twin Lakes has requested that some action be considered to seek some return on entrance fees. This concern was on the agenda with our joint meetings with NCANPHA representatives. No resolution is yet available. Hasty also reported that according to DOI the bed tax issue has now been ruled NOT to apply to CCRC's.

Don Hasty also reported on the DOI Advisory

Council meeting at which Jeff Trendel agreed to write a letter to all multi-site providers "reminding" them of the amendment or the Statute that was passed by the legislature last summer (HB 58-64-40). It now requires open discussion of a number of matters at the semi-annual meetings as they apply to individual facilities, not just to the whole corporation.

Bill Koehline reported from the nominating committee (see p.4 for later report). Myles Walburn reported on meeting with NCANPHA (see p. 2) and on the Driver Assessment Program at Carolina Meadows.(March HOT-LINE). Becky Ulrich of Scotia Village explained two current programs St. Andrews , Institute for Lifelong Learning & Quiz Bowl Projects (see p. 7).

Frank Earnhardt clarified recent changes to the ongoing bylaws revision. Associations name change to Association of Continuing Care Community Residents of North Carolina, reduction of the Board from 40 to 15 members

After the conclusion of the meeting the group was treated to a very attractive and delicious lunch.

Benefits of Aging

Eventually you will reach a point when you stop lying about your age and start bragging about it.

The older we get, the fewer things seem worth waiting in line for.

Some people try to turn back their odometers. Not me, I want people to know "why" I look this way. I've traveled a long way and some of the roads weren't paved.

When you are dissatisfied and would like to go back to youth, think of algebra.

Current CCRC Disclosure Statements

The North Carolina Department of Insurance has made CCRC Disclosure Statements available on the internet. The address is: <http://www.ncdoi.com/Industry/Other/Retirement/Financial/Facilities/DisclosureStatements.asp>. You will need an Acrobat Reader program (free on the internet) to read these statements. It is recommended that all consumers read the Continuing Care Retirement Communities Reference Guide to understand some of the differences between continuing care retirement communities before attempting to do any comparisons using these disclosure statements.

The following DISCLAIMER is noted:

a. Each disclosure statement is presented as filed with the North Carolina Department of Insurance.

b. These disclosure statements have not been reviewed or approved by any government agency or representative, including the North Carolina Department of Insurance, to ensure accuracy or completeness of the information set out.

c. The disclosure statements contained on this website are made available by the North Carolina Department of Insurance as a public service and as an information source only. Under no circumstances shall the North Carolina Department of Insurance be liable for any actions taken or omissions made from reliance on any information contained herein, from whatever source, nor shall the North Carolina Department of Insurance be liable for any other consequences from any such reliance.

Three Officers, One Editor Nominated for Election at Annual Meeting

The Nominating Committee will present nominees for President, Vice President, Treasurer, and Editor at the Annual Meeting in Greensboro on October 21. Myles Walburn, Carolina Meadows, who has served as President 1998-2000, has agreed to serve in that capacity for one year, 2004-2005. John Bowler, Belle Meade, has agreed to serve as Vice President for 2004-2005, with the expectation of being nominated as President for the following year. Sterling Whitener, Friends Homes West, who is concluding a second term as Secretary, has agreed to serve as Treasurer for 2004-2005. At press time the Committee had not identified a nominee for the position of Secretary. The search continues. Finally, the committee is very pleased to report that Lisbet Nielsen, who has served as editor of the HOT-LINE for three years, has agreed to do so for ONE MORE YEAR.

Bill Koehline, chairman of the nominating committee, thanks members Roger Cannon, Ivor Collins, Dan Knee, Buzz Lee, and Myles Walburn for their diligence and good spirits, and extends special thanks to Bob Wyatt and John Sloan for their work in seeking out and securing the acceptance of John Bowler.

Nominations from the floor will be accepted-provided that the nominee has agreed in advance to being nominated. The election of officers is traditionally the last act of each annual meeting. You are invited to attend and to stay for the vote. The future of CCCR of NC depends to a major degree on the elected officers.

Bill Koehline
Carolina Meadows

The Quaker Background of the Friends Homes in Greensboro

Mid-17th century England, with civil war and the beheading of a king, was in a state of chaos when the first people, called Quakers, emerged under the leadership of George Fox and other young "Seekers". Quakers survived this era as a growing movement in large part owing to their pacifism and the organizational genius of their early leaders, among them William Penn. Also known as the Religious Society of Friends, they were a Christian community marked, however, by distinct emphases on direct access to God, simplicity, integrity, peace, and human equality.

Friends began carrying their interpretation of the Christian life to the American shores as early as the 1650's, and two Quakers had settled in what is now North Carolina by 1665. George Fox visited in 1672. In the early 1680's William Penn was given a tract of land by the king in repayment of loans given the king by Penn's father when he was an admiral in the royal navy. For 75 years the "Quaker peace" reigned in Pennsylvania between Indians and the Quaker-controlled colony.

As Friends moved into the 18th century, a culture of applying Quaker testimonies in individual and corporate lives emerged. The 1800's in America saw an expansion of Quaker anti-slavery efforts, work with Native Americans, temperance, prison and mental health reform. By the 1830's Friends were also developing boarding schools that would eventually become colleges, Haverford (1832), Guilford (1837), Earlham (1847). The communities around Guilford and Earlham became important stations on the Underground Railroad.

As Friends combined their penchant for social concern with emerging patterns in the broader

society, one area that concerned them was elder care. They created innovative retirement communities, among them Friends Homes in Greensboro. The interplay of the characteristic Quaker principles in these retirement communities makes them special places. Both Guilford College and the wider Quaker community have benefited greatly since the establishment of Friends Homes next door to the college in the 1960's. The relationships formed by our students with their elders across the road enrich their college experience as well as the residents' own lives. While we might yearn for the Holstein cows that once grazed on the large dairy farm where Friends Homes now stand, the resources brought by so many well-lived lives are great compensation. Good to know that these Friends and their fellow residents aren't just "out to pasture!"

Max Carter

Director of the Friends Center,
Guilford College

Court Humor

Defendant (after being sentenced to 90 days in jail): Can I address the court?

Judge: Of course.

Defendant: If I called you a son of a bitch, what would you do?

Judge: I'd hold you in contempt and assess an additional five days in jail.

Defendant: What if I thought you were a son of a bitch?

Judge: I can't do anything about that. There's no law against thinking.

Defendant: In that case, I think you're a son of a bitch.

Belle Meade's Education Plan

One of the pleasures of living at Belle Meade in Southern Pines is getting to know the many younger people on the staff and seeing them almost every day in our activities and at meals. We have learned that several of them were going to school part time or full time at our local Community College.

In addition we learned that several more wanted to continue their education but could not afford the cost. Some of our residents formed a committee and developed an education plan to handle this problem. We decided to reimburse any hourly employee for most of their education expenses after they have been on the job for one year. These expenses include tuition, books, fees and a mileage allowance for driving to and from school. The only requirement is that the student must get at least a "C" grade in the course. We did not make this a merit scholarship program since we felt that anyone going to school and working did not need any more pressure to excel.

A fund drive was held during the spring of 2003 in which residents generously contributed almost \$20,000. The first payments of two grants to employees were made in June of that year. Since then seven more grants have been made at an average cost of about \$500 each. More and more of our employees are now making plans to go back to school.

This is most gratifying. Many of our residents are following, with great personal interest, the education plans of our employees. We are looking forward to the day when some of these students will graduate and go on to new careers.

Carolyn and Dean Holzgraf
Belle Meade

Centennial Birthday Wish

A birthday party for a centenarian? How would you celebrate your 100th birthday? Whatever your answer, you ~ will have difficulty matching the wish that Carolina Meadows Health Center resident Doris Jones not only expressed, but came very close to having fulfilled. For her 100th birthday. ~ Doris wished she could ride a horse. Faye Culberson, Carolina Meadows activities assistant, decided that she would come as close as possible to making that wish come true. Culberson lives on a farm near Siler City, owns four horses and is responsible for the activity program in the Health Center: Among other things, her job requires, a high degree of creative imagination and sensitivity to the needs of each of the residents there.

While many people would merely have smiled benignly at Jones' ride-a-horse request, Faye said, "OK, let's have a birthday party with horses." Seven Health Center residents, five of them in wheelchairs, were loaded aboard a Carolina Meadows bus. With the assistance of Jody Hite and Karen Wolfe, the whole crew, including Jones' daughter Allee, son Don and his wife, Sally, who also live at Carolina Meadows, made the 45-minute journey to Faye's farm. So did Charlotte Adams who is 101. Faye had pre-arranged with a neighbor to have all four horses prepared for the visit. While riding them was a miracle that even Faye couldn't arrange, petting and a bit of judicious hugging was OK; in fact, the horses responded warmly even including a wet kiss or two on Jones' cheek in honor of her birthday.

Ed Robie
Carolina Meadows

Jones died soon after this trip.

AD HOC COMMITTEE FOR FINANCIAL CONCERNS

This is an update on the status of the results of the Ad Hoc Committee For Financial Concerns' efforts over the past months. Many of you will recall that this Committee, consisting of five resident members from five separate Continuing Care Retirement Communities (CCRC's), was appointed early in 2003 to review the current status of these concerns across our State and to present their findings in a final report upon completion of their study. I've reported previously that many residents in CCRC's are satisfied with financial information they receive and that they enjoy participation in decisions that affect them. Other residents in other CCRC's are not so fortunate in this regard, they are concerned about the lack of information they receive, and they have not been able to have a say in decisions that affect them.

During the summer of 2003, this Committee made its final report to your Executive Committee and the Committee was thanked and dismissed. Their report was distributed to the CCCR of NC Board of Directors, NCAN-PHA (The North Carolina Association of Non-Profit Homes For The Aging) and to the North Carolina Department of Insurance. Since that time, a number of meetings have taken place to review results of that report and to consider what might be accomplished in the future to improve some of the current conditions that appear to be inadequate.

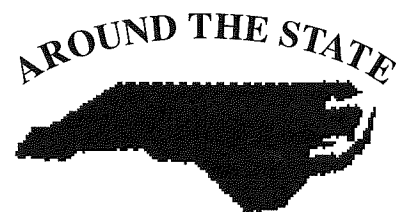
This is to inform you of the latest of those meetings. In June of this year, three members of the original Ad Hoc Committee met with Jeff Trendel, the person in the North Carolina Department of Insurance who is primarily concerned with both providers and residents of CCRC's in our State. The purpose of that meeting was to review with Mr. Trendel the report of

the Committee and to consider what conditions might be improved with the assistance of the Department of Insurance.

Four significant concerns were reviewed with Mr. Trendel in June. The first was the concern that no difficulty that residents have with their providers can be addressed, even through a lawsuit, if the event occurred more than three years after the resident's contract with the provider had been signed. The second was the need for at least one resident to be included on the provider's Board of Directors in order to participate in decisions and to gain information that affect them. The third was the need to add a reference in the Statute N.C.G.S. 58-64-40(b) that would include the word "fee" in discussions and the need to justify proposed fee increases to residents. The fourth and final concern was the perceived need for the Commissioner of Insurance to assume the role of "Ombudsman" to assist residents by acting in their behalf in difficulties that may arise from time to time with their providers. It is our understanding that Mr. Trendel intends to include these matters on the agenda in his next meeting with the Department's Continuing Care Advisory Committee in September. We hope to be able to give you an updated report of these activities at our Annual Meeting to be held on October 21 in Greensboro.

Don Hasty





Green Thumbs Blooming at Glenaire

Orchids welcome visitors and residents at the main entrance of Glenaire Community in Cary, N.C. Glenaire greenhouse committee's work is on display in the common areas and the Health Center providing a constant supply of blooms for everyone's pleasure. The committee of twelve, with the assistance of a weekly community volunteer groundskeeper (Barbara Lee), is responsible for growing and maintaining residents' flowering plants.

Orchids are the dominant flowers and numerous varieties abound. In 1993, incoming resident, Gordon Poole, requested a greenhouse be built to house his extensive orchid collection. Administrator Dr. Sam Stone approved the construction of the greenhouse. Until recently it was maintained by the Glenaire garden staff. As the number of plants increased, residents created a committee to care for the plants and maintain the greenhouse.

Currently the greenhouse has over 200 orchids. Ninety amaryllis, owned by resident Lawrence Harris, also benefit from the controlled environment. The committee maintains these and other plants. When the plants bloom they are displayed throughout the facility or returned to their owners. Plant cuttings are taken, grown and later given to new residents or sold at a minimal cost with the proceeds providing funds for greenhouse supplies.

Glenaire residents take pleasure in the work of their fellow residents throughout the year. The committee is proud of the service they provide and there are also benefits from the camaraderie, fun and growing friendships their hobby provides.

Mergeret Black

Glenaire



Aging

Ever leave one room to go to another to do something and when you get there you have no idea why you are there? This is commonplace. No you are probably not getting Alzheimers. You and your mind are just moving too fast and not paying attention. Don't leave room number one until you fix it in your mind just why you are leaving and where you are going and what you're going to do when you get to room number two. Don't stop to talk with anyone or answer the phone while in transit. And if you do forget, don't worry. This is commonplace . . . or did I mention that already?

Better by far that you should forget and smile, than that you should remember and be sad.

Christina Georgiana Rossetti.

Scotia Village Works Toward Mental Agility

Blessed by its proximity to St Andrew's Presbyterian College, Scotia Village participates in the SAILL program, sponsored by the college, which offers senior programming to all of Scotland County and its neighbors. SAILL – St. Andrews Institute for Life-long Learning – presents opportunities for discussion and learning on a wide variety of topics from poetry thru the Great Books and the history of WWII to Swimmercise, or water aerobics. The format is familiar; two semesters - fall and spring - offer a smorgasbord of options. A popular "course" this past spring was Freud for the Jung at Heart. You can see why we enjoy ourselves. Teachers are a mixture of professors' emeriti and current at St Andrews, as well as community members with a particular interest to offer. Classes meet both at Scotia and at St. Andrews as are most convenient to all involved. Next year we hope to incorporate the Great Decisions program we learned about at Twin Lakes last winter.

We also enjoy ourselves at Scotia with Quiz Bowl Contests utilizing the skills of a local school teacher with high school quiz bowl experience as quiz master. We divide into teams of four which compete against one another (or others) in a series of questions growing in value from ten points to thirty. Answers are always given by the team so no one's ignorance is exposed. Our quiz master uses the internet to obtain her questions; usually they are from former high school quiz bowls, but we are urging her to look toward middle school or even elementary questions as our powers of memory dwindle. We compete against anyone who will come, from the students at Scotland High, to Campbell Soup employees (they are tough) and even once against the administrators from our corporate headquarters in Jamestown (PHI of

NC). We have decided to be charitable when challenging the latter lest it influence increases in our rates. Twice we have even gone as far afield as Carol Woods—now that is tough competition. We would welcome any of our sister (and brother) communities to compete with us; it is really fun and stimulating. Sometimes the best part is making up the wildest answer because nobody knows! We can help anyone interested to find materials on the internet - and are willing to travel. Maybe if we are very persuasive we can even bring our quiz master and her questions with us. Anyone interested may contact Annie Mary Luke at Scotia Village (Apt. 216 Scotia Hall, 2200 Elm Ave. Laurinburg, NC28352), our co-coordinator. See you 'round the encyclopedia!

Becky Ulrich,

Scotia Village

Christmases Past

Joanne Martell, at Belle Meade in Southern Pines, would welcome material for a book titled: AMERICAN CHRISTMASSES: Firsthand Accounts of Holiday Happenings from Early Days to Modern Times. If anyone has an old family letter or journal entry or memoir that tells of an American Christmas event--ordinary or extraordinary, happy or sad--Joanne would like to hear from you.

Joanne Martell

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