



The Hotline is published periodically by Abel Publication Services, Inc., 1611 Aquinas Court, Burlington, NC 27215, for the Continuing Care Community Residents of North Carolina, Inc., c/o CCCR of NC President Willie Johnson, 2600 Croasdaile Farm Parkway, #A-328, Durham, NC 27705. Submissions to the Hotline and other Hotline-related communications should be addressed to the Hotline editor, Sandra Lovegrove, at the Burlington address above, e-mailed to sandabel@aol.com, or faxed to (336) 585-1851.

<CCCRofNC.org>

The CCCR of NC HomePage has been redesigned and revitalized—check it out!

Membership Application

One-year membership is \$5 for an individual, \$10 for a couple. Life membership is \$50 for an individual, \$100 for a couple. Checks should be made payable to CCCR of NC and given to your community's CCCR of NC 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 CCCR of NC representative is, you may find out by contacting CCCR of NC President Willie Johnson, 2600 Croasdaile Farm Parkway, #A-328, Durham, NC 27705; e-mail <williedjohnson@aol.com>. If your community does not have a representative, mail checks to: Management Services for Organizations, P.O. Box 1783, Salisbury, NC 28145-1783. The form below is provided for your convenience.

APPLICATION FORM (please print or type)

(Your name) _____ (Spouse's name, if applicable) _____

Address _____

Status (please check one): ___ Renewal ___ New member

Enclosed is payment for (please check one):

One year: ___\$5 single ___\$10 couple Life: ___\$50 single ___\$100 couple

Annual Meeting Was a Winner!

EVEN THE WEATHER COOPERATED on Thursday, October 20, to make CCCR of NC's 2005 gathering a perfect day. Over 250 members attended. This meeting, like the 2004 Annual Meeting, was held at Christ United Methodist Church in Greensboro, a centrally located facility large enough to accommodate the statewide crowd.

Gina Upchurch, RPH, MPH, FASCP, presented the keynote speech, "Medicare Changes Coming—Ready or Not." Gina is Executive Director of Durham-based Senior PHARMassist, a nonprofit group working with seniors, and a professor at UNC-CH. She presented in a very lucid way the details

of the impending changes in the prescription drug coverage under the Federal Medicare program, outlining the choices available to each senior, the advantages and disadvantages of each, and a recommendation to follow for the circumstances of each person. The complexity of the program is such that everyone could not easily determine his or her best



Gina Upchurch



Attendees listen to Gina's speech.



Breakout session leaders (top to bottom): Gina Upchurch, Dr. J. Gordon Chamberlain, Kevin McLeod and Ken Reeb, Allison Darwin.

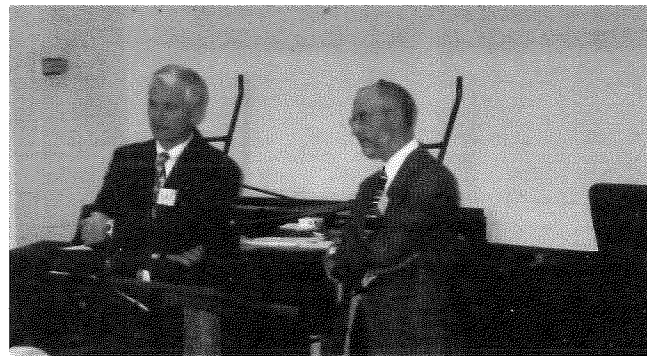
action, but Gina's discussion was most enlightening. The group received her presentation enthusiastically and was especially appreciative when she answered many specific questions.

After a break for lunch, the attendees split into four groups and attended the special-interest sessions*.

The session on Medication Management was led by Gina Upchurch, the morning speaker. She stressed the importance for each of us to carry with us at all times a list of all prescription, over-the-counter, and herbal medications we are taking. The list should include the name, dosage, the reason we are taking it, and when and how we take each medication. The list should be shown to each of our health-care providers. Experts rank medication-related problems as the fifth leading cause of death in the United States. It was stressed that we should be knowledgeable about the medications we are taking. Doctors are too busy to know about all the drugs that are available on the market, so we should do some of the homework ourselves. If you are interested in finding out more about the drugs you are taking, an excellent source is the Consumer Reports Web site, www.crbestbuydrugs.org.

Death with Dignity/End-of-life Issues was led by Dr. J. Gordon Chamberlain. He began by surveying all 39 persons in attendance

*Descriptions of the first three sessions are from the *Abernethy Countdown*. Thanks to Wen Swift for providing it.



maintenance: expense, supplies, labor; 5) AV equipment service requests: initiation, processing, scheduling; 6) Setup and operating personnel for events needing AV support.

Should we be favored with appropriate responses from individual communities, we will be pleased to collect and publish the information for the benefit of all. Possibly we can learn something useful from this endeavor.

Arthur (Art) E. Wilde
750 Weaver Dairy Road, Apt. 1304
Chapel Hill, NC 27514



Continuing Care Community Residents of North Carolina

BUDGET REPORT FOR FISCAL YEAR 2004/2005
(October 1, 2004 – September 31, 2005)

	Budget	Expenses Oct 1 to Sept 30
Annual Meeting	\$ 500	\$ 81.76 (1)
Board and Executive Committee	500	561.50
Dues – Membership Fees	500	472.65
HOTLINE Expenses	9,000	7,515.74
Membership Development	500	1,235.64 (2)
Miscellaneous	500	150.00
Management Services for Organizations	3,500	4,285.00
President's Expenses	650	835.53 (3)
Secretary's Expenses	350	263.32
Treasurer's Expenses	100	0.00
Regional Expenses:		(4)
Eastern	1,800	1,300.00
Central	1,250	1,258.00
Western	1,850	1,850.00
Representation	2,000	1,374.12
Website	1,000	167.40
Total Expenses	\$24,000	\$ 21,350.66

Notes:

1. Net of registration fees
2. Printing cost of new brochure
3. Telephone, copying and postage expenses
4. Regional refunds for 2005 = \$2,525.03

Board of Governors. The new Chair is Margaret M. Mullan, CEO of the Beatitudes Campus of Care in Pheonix, Arizona. In a brief statement she announced the three goals she had for 2006. They are: first, moving ahead with the Quality First pledge to a real commitment toward the achievement of health, affordable and ethical long-term care throughout the organization. Second, she pledged to work to elevate the role of residents, starting with a greater role in public policy. Third, she urged the membership to increase the diversity of leadership throughout AAHSA.

On Tuesday AAHSA hosted a lunch for all residents participating in the meeting. Peggy Mullan, true to her word, also attended the full time and sought to get suggestions from residents about how AAHSA might become more responsive to their interests. NaCCRA had a later meeting but I was unable to stay due to a previous commitment. Unlike previous years, if there were leaders of state residents' associations present I was not able to identify them. That evening the entire group gathered at an auditorium for "An Evening with Lily Tomlin."

One morning the CEO of AAHSA, Larry Minnix, led a session that included a panel of staff members who worked in facilities that had been damaged or destroyed by the various hurricanes that swept through the Gulf region. They told of trying desperately to care for residents and patients under the most severe conditions without help or resources. Several were overcome by emotion as they recounted their experiences.

In addition to the formal program the week provided many opportunities to interact with other participants,

learning about their situations and developing new friendships. Since North Carolina has one of the stronger state residents' associations, I believe it is very important for CCCR of NC to have one or more people attend each year. I am most grateful for the financial support of Carolina Meadows and the Executive Committee of CCCR of NC that made it possible for me to be present and benefit from this stimulating and informative week.

Myles Walburn

CCCR of NC Past President
Carolina Meadows

What Is Your Community's AV Support Strategy?

HERE AT CAROL WOODS our AV needs are satisfied in a manner we think of as unique. I became curious as to just what extent our system actually is unique, compared with AV systems at other CCRCs in North Carolina. When I suggested to our CCCR of NC representatives that they endeavor to ascertain the basics of AV treatments at the other CCRCs, they countered with a suggestion that I prepare a Hotline communication directed toward eventually enlightening all of us about the various means being used to fulfill AV needs.

Toward that goal I list below the information we would like to have: 1) Rooms or areas where AV equipment is used or desired; 2) AV equipment or facilities built in or dedicated in basic construction; 3) Currently useful AV equipment subsequently acquired; funding and ownership; 4) Equipment

concerning certain points to be discussed. Approximately 98% spoke of not wanting extreme measures taken to prolong their lives beyond the point that life has meaning and quality. It was pointed out that everyone should have a Living Will, Health Care Power of Attorney, a Medical Directive, and, for those who are so inclined, a Do Not Resuscitate form to instruct family, physicians, lawyers, clergy, and others about his or her wish to die peacefully. Many attending left the session with a renewed urgency to update or complete the documents needed for death with dignity.

Everything You Ever Wanted to Know about CCRC Finances was moderated by Kevin McLeod and Ken Reeb, Chief Financial Officers of Carolina Meadows and Carol Woods. This informal presentation was given in a question-and-answer format. Among areas covered were budget preparation, appointment of residents to the many community resident committees, the yearly income tax letter, monthly fees and the margins, increasing the base price of units, occupancy rates, new construction, and remodeling existing units that are currently unmarketable.

Driving Assessment for CCRC Residents: What Works?, was demonstrated by Allison Darwin, OT, and Jenny Womack, MS, OTR/L, who described the program in place at Carolina Meadows.

Following the special-interest sessions, a business meeting was called to order. Sterling Whitener gave the treasurer's report (see page 11), which included a balance of \$3,116.03 in the checking account and \$39,064.82 in the reserve fund. The proposed budget for 2006 was presented and adopted



Incoming CCRC of NC President Willie Johnson (right) accepts the gavel from outgoing President Myles Walburn as new officers for 2005-2006 are inducted.

by voice vote. It proposed a total expenditure of \$28,040.

The Nominating Committee's recommendations for officers for the 2005-2006 fiscal year were adopted by voice vote. The new officers are: President, Willie Johnson, Croasdaile Village; Vice President, Bob Wyatt, Belle Meade; Secretary, Ted Blount, Arbor Acres; Treasurer, Walton Boyer, Deerfield.

Revised bylaws were presented and adopted after a few words were changed to make the document gender-neutral.

The meeting adjourned after what was a pleasant and informative experience for all who were present.

Ted Blount
Secretary

Tips from Gina's Talk

ANYONE WHO IS ENROLLED in Medicare Part A and/or Part B is eligible to enroll in the new prescription drug benefit plan, called Part D. All Medicare beneficiaries are eligible to enroll, although it is not required to do so. People who have limited resources or very heavy drug expenses will be the primary beneficiaries of Part D.

Part D is not a standardized government benefit. It is administered by private companies with different cost-sharing arrangements. There are 31 such companies in North Carolina, each of which may offer up to three different variations of Part D.

If your present coverage is as good as or better than Part D, that is, if it provides what is called "creditable" coverage, you will probably want to stay with it. Your existing plan will send a letter stating whether its coverage is "creditable." (Keep the letter; if you ever decide to switch to Part D, proof of creditability will save you from having to pay a late-enrollment penalty fee.) Many retiree plans, VA, Tricare, etc., now provide "creditable" coverage that is likely to be better than Part D's.

Medicare beneficiaries without "creditable" coverage will probably want to enroll in Part D. They will pay a (variable by company) monthly premium plus (variable) co-payments for drug costs. Not all drugs are covered, depending on the individual companies' plans. Check to make sure the drugs you need are covered by the plan you choose. If your drug is not covered, you will have to pay the entire cost of the drug.

Part D plans have a "doughnut hole" (Figure 1). After a deductible of \$250, the plans pay 75% up to a total of \$2,250, after which you are on your own until costs reach

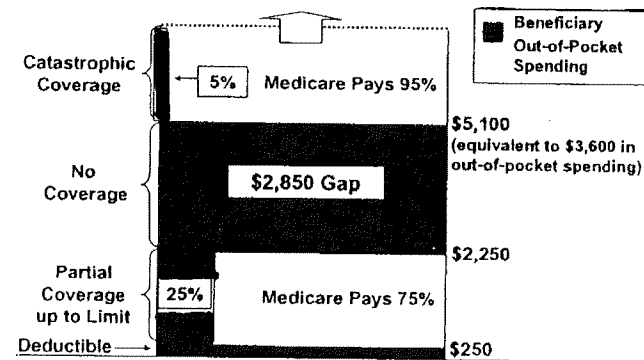


Figure 1. The "doughnut hole." Medicare Part D beneficiaries' 2006 out-of-pocket drug spending under the new benefit. Benefit levels are indexed to growth in per-capita expenditures for covered Part D drugs. As a result, the Part D deductible is projected to increase from \$250 in 2006 to \$445 in 2013; the catastrophic threshold is projected to increase from \$5,100 in 2006 to \$9,066 in 2013. (Reproduced with permission from PHARMAssist.)

\$5,100, when the plan kicks in again, paying up to 95% of further expenses.

Each plan will list which drugs it will cover and how much beneficiaries will have to co-pay for them. To choose a plan, find one that covers all of your drugs.

Enrollment in Part D is available until May 15, 2006, without penalty.

For more information,

Consult the *Medicare and You* handbook
Call 1-(800) 633-4227 or access www.medicare.gov

Call the NC Seniors' Health Insurance Information Program (SHIP), 1-(800) 443-9354. They have a finder tool that allows you to identify the drugs you need and your preferred pharmacy. The information is returned to SHIP, which will identify the Part D plans that match your requirements.

Contact PHARMAssist, (919) 688-4772

CCCR Connections

AAHSA Meets in San Antonio

THE 2005 ANNUAL MEETING and Exposition of the American Association of Homes and Services for the Aging (AAHSA) opened in the Convention Center in San Antonio, Texas, on November 7. It was reported that more than 7,500 people attended from all over the United States and several other countries. The theme of the week-long meeting was "Quality Through Community."

AAHSA consists of approximately 6,000 not-for-profit CCRCs, nursing homes, assisted living and senior housing facilities and community service organizations. Its headquarters is in Washington, D.C. In North Carolina it is the North Carolina Association of Homes and Services for the Aging.

The program consisted of general sessions in the mornings with speakers addressing various aspects of the theme. The balance of each day was divided between concurrent educational sessions and wandering through the exposition hall, where hundreds of vendors displayed the latest products and technologies in aging services.

The opening sessions were all outstanding. The first presentation was made by North Carolina's Maya Angelou, who spoke on "The Power of Partnerships." Using story, song, and poetry, she provided many insights about how none of us "can make it out here alone." The second day the speaker was Richard Chait, a Harvard professor and author of the popular book *Governance as Leadership: Reframing the Work of Nonprofit Boards*. His talk was entitled "The Power of Governance." Next we heard Patrick Lencioni talk about "The Power of Teams." With great power and humor he offered a new model with actionable steps for cultivating high-performance management teams. He is the author of several books, including *The Five Dysfunctions of a Team*. Finally, Kevin Carroll, founder of the Catalyst Consultancy, described how individuals can obtain their highest degree of promise through the power of passion and imagination.

There were nine periods of one hour to one and a half hours to attend the educa-

tional sessions. With more than 200 from which to pick I usually tried to attend parts of two different ones in each session. My selections included Succession Planning, Social Accountability, Building Public Trust, What Trustees Need to Know, Exempt Organization Governance Reform, Involving Residents in Master Planning, Best Practices in Compensation, Governance within Tax-exempt Organizations, Expanding Your Mission without Building More Walls, Workplace Violence, Older Driver Wellness, The Changing Role of the CFO, and So You Want to Be a Multi-site Provider. In many sessions there was spirited dialog between the presenters and the participants. Each included a Power Point presentation and a paper copy of all the images used. Tapes (\$20 each) or videocassettes are available for most of the sessions. (You may contact me for a complete list of sessions, other prices, and request forms.)

In addition, AAHSA conducted its business session at the Annual Meeting. Among other things, it elected a new

Walton discussed the need for an audit of our funds. The consensus was that we do not need a certified audit, which would be expensive and include details that we do not need. Each year we will have an accountant verify that our books are in order,

At Walton's request we established a system whereby each check issued will be approved by another person, usually the President. This approval can be given by e-mail.

Walton said that our organization is in good financial shape for the present but that increased membership should be pursued vigorously and that an increase in dues may have to be considered later.

The Treasurer's report was accepted by unanimous vote.

Myles Walburn was asked to report on the AAHSA meeting. He passed around materials from the meeting and summarized some of the talks. Presentation topics included Planning for succession of administrators; Elevating the role of residents in governance; Diversity in leadership of CCRCs; Social accountability of CCRCs; and Power of teams in governance. (See Myles' report on page 9.)

There was a general discussion about the numbers of meetings needed for the various

parts of CCCR of NC. It was the consensus that the Executive Committee should meet when the President perceives a need for a meeting. The Board should have a regular meeting to share experiences and to allow members to become acquainted.

The need for continued strategic planning was emphasized.

Sandra Lovegrove, editor of the *Hotline*, stated that although she is not responsible for soliciting material for the issues, she will publish anything appropriate that is sent to her.

Reporting for the Western Region, Dick Nielsen said the regional meeting at Aldersgate on August 18 had been well attended. A program dealing with Alzheimer's disease was presented, and officers were elected. Ted Blount reported that a Central Region meeting is scheduled for March 23 at Arbor Acres. A neurologist will speak about some of the health problems of aging and a professor will talk about the possible pitfalls in family reunions. Bob Wyatt reported that the Eastern Region's executive committee will meet January 24 to plan for an April meeting.

Ted Blount
Secretary

In Memoriam

Dr. William Fisher Palmer

We are saddened to announce the death of Bill Palmer, who, with his wife Anne, owned Management Services for Organizations, which keeps the membership records for CCCR of NC. Bill, a former teacher, professor, and author of a mathematics textbook, was active in many civic and church endeavors. He is survived by his wife, Anne, son Richard, and daughter Katherine Palmer Frost, to whom we extend sincere condolences.

From the President

TO ALL IMMEDIATE PAST OFFICERS of CCCR of NC who served so diligently, we owe our deepest gratitude. In fact, I think it appropriate for each of us, wherever we may be, to give them a standing ovation. With Myles at the helm, many accomplishments were achieved which will definitely impact the future of our organization.

What do you perceive the future to be? What do you want it to be? You, as members, play a vital role in making this determination. Your active participation in expressing interests, suggestions, or concerns will enable the officers to establish their leadership roles in order to

serve you more effectively. Therefore, don't be shy, because I can assure you that your input is very important to the continuance of a great CCCR of NC.

The Executive Committee met and, in discussion, decided that emphasis should be placed on the promotion of membership in our organization. There are many ways in which you can make this effort a reality. Be sure that all residents in your community are aware of the impact our organization has on legislation that affects them. The greater the membership, the stronger the voice. There is so much available information that we can

receive through interaction with residents from other communities. Let's not just be dues-paying members but be as active as possible.

I have accepted the presidency with humility and as an honor. However, I realize my limitations, but have faith that there are those who are willing to lend a helping hand. I am not bashful and will ask for that hand! With anticipation, I look forward to becoming better acquainted with each of you.

May you be blessed during the holiday season.

Willie Johnson



Scene at Twin Lakes after a winter storm. Photo by Buddy Blakely.

What's Next for CCCR of NC?

OVER THE PAST YEAR and a half our organization has accomplished a great deal. A seven-member Strategic Planning Task Force worked through most of the summer of 2004 to propose a revised statement of purpose and a new structure that shifted much initiative to the three regions of the state while continuing to maintain the statewide organization. It also revised our financial practice to share financial resources with the regions. Several other operational changes were suggested.

The report of the Task Force was adopted by attendees at the Annual Meeting in October 2004, and new leadership was elected to put the proposals into practice. During 2005, much of this has been accomplished. Each of the regions, East, Central, and West, has appointed its own leadership, organized itself to plan and conduct programs that are of interest to participating residents, and sent a representative to the Executive Committee of the Board of Directors. The Board of Directors met for the first time under the new

structure in February 2005. The Executive Committee has met twice. A new membership brochure was developed and distributed. A new set of bylaws was adopted. Our relationship with NCANPHA has clarified and strengthened. From all reports, our 2005 Annual Meeting was a success. An entirely new set of officers has come forward and they are now at work. A lot has been accomplished!

So, what is next for CCCR of NC? I suggest that we spend 2006 doing at least two things. First, we have just barely started exploring our options and possibilities in the regions. I believe each region needs to increasingly define what seems right for it. Each can develop its own personality and, while remaining interested in what is happening in the other regions, need not feel constrained to replicate anything that is being done elsewhere. There are unique resources in each region; residents have different interests; we need to think and plan without being limited by what we have

done in the past. It may take a while to find ways to fully take advantage of this freedom and opportunity but I believe the payoff can be the enrichment of the lives of many residents.

Second, we need to enlarge our fellowship. Urge each regional group to develop a plan to invite residents of CCRCs not currently represented to join the party. Each region also has a financial incentive to increase its membership. There are probably 15,000 residents of CCRCs in the state, and with our membership now at about 4,000 we have lots of room for growth. I believe we can and need to increase in numbers and in the quality of our programs and activities simultaneously. Let's work on renewing current members and attracting new ones. I am very encouraged by our new officers and hope we can all do our parts to ensure that the momentum of last year will continue throughout 2006.

Myles Walburn
Past President

Dues Due: CCCR of NC's 2004-05 fiscal year ended September 30. If you have not already paid your dues for 2005-2006, please do so now. CCCR of NC supports you, and needs member support to make it happen! Checks should be made out to CCCR of NC and given to your local CCCR of NC representative.

New Executive Committee Meets

PRESENT at the Executive Committee meeting November 15, at Friends Home West, were President Willie Johnson; Vice President Bob Wyatt, who is also the representative of the Eastern Region; Secretary Ted Blount, who is also the representative for the Central Region; Treasurer Walton Boyer; Dick Nielsen, representative of the Western Region; Past President Myles Walburn; and Sandra Lovegrove, Editor of the *Hotline*. Sterling Whitener, Past Treasurer, came in during the presentation of the Treasurer's report.

President Johnson presided.

Treasurer Walton Boyer gave the Treasurer's report. The budget amount for the fiscal year October 1, 2005, to September 30, 2006, is \$27,987.00 and expenses to date have been \$4,140.77. The largest disbursements so far have been those to publish the *Hotline*. Accounts still payable include the three regions' allocations and \$692.89 for Myles Walburn's trip to San Antonio for the AAHSA meeting. The annual meeting was more expensive than the money taken in by \$193.46, plus \$350 paid separately to Gina Upchurch. This is the first time we have had such a deficit, so

there will probably be a change in the registration fee structure next year.

Walton noted that the budget for the year exceeded the expected income. He suggested that more members would bring in more income, and the group discussed methods of recruiting more members. Many facilities have ongoing recruitment programs.

Expenses for the Treasurer were more than budgeted because we changed banks and had to purchase checks and deposit slips. As a result, a motion to increase the Treasurer's allowance to \$300 per annum was made, seconded, and passed.

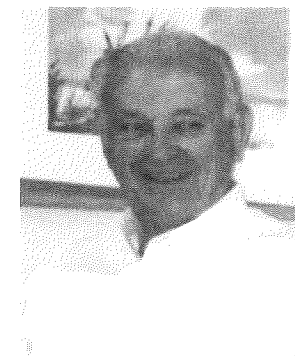
Walton reported that we now have two accounts at Wachovia, an operating fund with a current balance of \$2,046.26 and a money market fund with a balance of \$20,118.93, and \$18,449.18 in a reserve fund composed of CDs at the Lexington State Bank.



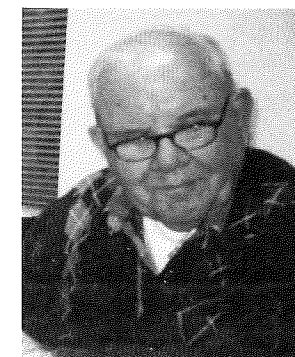
Willie Johnson



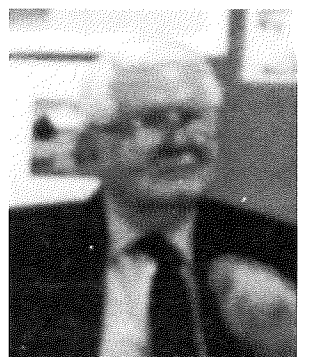
Ted Blount



Bob Wyatt



Walton Boyer



Dick Nielsen