

The hotline

MEET SINDY BARKER CHAIR NCCCRA LEGISLATIVE COMMITTEE

Sindy Barker, Chair of the NCCCRA Legislative Committee, moved with her husband Brad to Carol Woods in September, 2013. The timing of their move and the need for NCCCRA to take a more active role in lobbying for CCRC residents coincided. The 2013 General Assembly had passed legislation which eliminated the medical expense deduction. In April 2014, the NCCCRA Eastern Region passed a resolution to try to reinstate this deduction. Carol Woods had formed a legislative subcommittee of their NCCCRA Special Interest Group. Enter Sindy with a 19-year background in lobbying. She was able to put together a 23-member Legislative Committee from

CCRCs across the state who, in turn, energized residents to write letters, send emails and make calls to their legislators. And, by the end of the 2015 legislative session, the medical expense deduction was reinstated for all citizens with high medical expenses.

Sindy retired as the executive director of the North Carolina Nurses Association (NCNA) in 2006. She began her career with NCNA as lobbyist in 1987 and continued in that role until her retirement. In the late 1980's North Carolina was entering into another severe nursing shortage. Both the Governor and the General Assembly created committees to study this shortage. Sindy's first lobbying efforts resulted in the establishment of first Center for Nursing in the country supported by state funds and the Nursing Scholars Program which is still providing thousands of scholarships for students seeking to become registered nurses.

Those 19 years of lobbying included the following highlights for nursing practice:

- advanced practice registered nurses are directly reimbursed for their services by insurance companies (1993);
- the NC Corporations Act was amended so that registered nurses could form corporations and partnerships with physicians and not always be an employee relationship (1995);
- NCNA in conjunction with the NC Board of Nursing achieved legislation which allows nurses to practice across state lines via the interstate nursing compact;
- the title of nurse is protected (1999); and
- health care providers delivering direct patient care must have their credentials on name badges (1999).



Sindy has a degree in political science from the University of Tennessee. Five years after graduation she served on her first political committee – a citywide task force which studied and made recommendations to the school board about how to avoid "re-segregation" of the public schools in Knoxville. A few years later she served as a delegate to the Tennessee Democratic Convention in the year that the Democrats decided to open the party to women and blacks. Although she considered running for the North Carolina legislature in the mid-1990's, politically she contented herself with becoming a chief judge in her voting precinct.

Throughout her lobbying career, Sindy had the support of her husband Brad. This was particularly true in the NCCCRA effort to reinstate the medical expense deduction last year. He traveled with her to various NCCCRA meetings and served as the "poster person" illustrating high medical expenses at the General Assembly. He loved that role and was always eager to engage in conversations about the topic. Brad died in January of this year, but was so proud that he was a part of the NCCCRA legislative success.

In May, Sindy was elected to a one-year term on the Board of Directors of LeadingAge NC. Her director slot on the board is reserved specifically for a resident of a LeadingAge NC member community. When considering this appointment, she had several conversations with Tom Akins who is CEO of LeadingAge NC. In their conversations, she was assured that her role as Chair of the NCCCRA Legislative Committee (or any actions that the committee might recommend to the NCCCRA Executive Committee) would not interfere with her ability to serve on their board. One of the critical points in her decision to serve would be her ability to confer regularly with the NCCCRA Executive Committee on items on LeadingAge's board agenda which affects residents or the ability to ask for items to be discussed by their board. Tom was comfortable with this suggestion.

So, she reminds us to stay tuned and remain active on legislative issues affecting each of us living in a continuing care community.

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HHS BUDGET PASSES HOUSE APPROPRIATIONS COMMITTEE

Mary Bethel

On Thursday, May 12, the House Appropriations Committee on Health and Human Services (HHS) approved its recommended continuation and expanded budget for FY16-17. The full House Appropriations Committee will meet next Tuesday, May 17, from 9:30 a.m. to 4:00 p.m. in room 643 of the Legislative Office Building to discuss (and probably approve) the budget. The budget approval process appears to be on a very fast track.

Highlights of items in the budget pertaining to aging are:

- Increases funding for **Project CARE** (Caregiver Alternatives to Running on Empty) effective October 1, 2016, to support families acting as caregivers for family members with Alzheimer's disease. The increased funding will provide vouchers for respite services and three additional full-time family consultants for Project CARE. (\$550,000 in recurring funding).
- Creates two full-time equivalent staff positions within the
 Division of Aging and Adult Services to oversee continued
 development and implementation of the No Wrong Door to
 Accessing Benefits initiative. This includes enhancement of
 the NC 2-1-1 database and management of the Alzheimer's
 disease and dementia-related stakeholders
 partnerships. (\$200,000 in recurring funding).
- Provides funding to the Department of Health and Human Services to establish a pilot program to increase access to Food and Nutrition benefits for individuals who are dually eligible for Medicare and Medicaid through outreach and assistance with completion of the Food and Nutrition Services applications. (\$600,000 in non-recurring funding).
- Provides funding to increase the State-County Special
 Assistance rate effective October 1, 2016, to \$1,216 for adult care homes. This is a \$34 increase. The rate has not been increased since 2009. (\$3,750,000 in recurring funding).
- Provides funding for Medicaid for the projected increase in the number of individuals receiving State-County Special Assistance due to the increase in the income eligibility level effective October 1, 2016. Individuals receiving State-County Special Assistance are automatically eligible for Medicaid. (\$4,100,000 in recurring funding).

Expands support for Alzheimer's patients and their families through additional slots for the **Community Alternative Program for Disabled Adults** (CAP-DA). (\$1,500,000 in recurring funding).

Non-recurring funding for the Home and Community Care Block Grant in the amount of \$969,549 for FY16-17 that was approved last year is continued in the budget. There had been some confusion as to whether this remained in the budget.

WHEN IS A LEGISLATOR SIMPLY A LEGISLATOR?

Sindy Barker, Chair NCCCRA Legislative Committee

I am often invited to come to a CCRC for a program featuring one of our North Carolina legislators. Most recently, Bob Hunt from Wellspring had invited a state senator and state representative to come to his CCRC to talk about legislative issues. He had also invited residents from Friends Home Guilford and Friends Home West to attend the program. I asked him if either legislator had a contested race in the fall and if so, to be perfectly safe their opponent(s) should be invited as well. After much going back and forth, Bob checked with the NC Board of Elections who said that it would not be a problem from their point of view.

My concern was raised because most of our CCRCs are non-profit and have an IRS designation as a 501(c)(3) organization. "Under the IRS Code, all 501(c)(3) organizations are absolutely prohibited from directly participating in, or intervening in, any political campaign on behalf (or in opposition to) any candidate for elective public offices. Violating this prohibition may result in denial or revocation of tax-exempt status and the imposition of certain excise taxes."

However, in the case of Wellspring, it would appear the following statement would apply. "Depending on the facts and circumstances, an organization may invite political candidates to speak at its events without jeopardizing its tax-exempt status. Political candidates may be invited in their capacity as candidates, or in their individual capacity (not as a candidate)." The Code goes on to say "An organization in this position should keep in mind that the candidate may not be familiar with the organization's tax-exempt status and that the candidate may be focused on compliance with the election laws that apply to the candidate's campaign rather than the federal tax law that applies to the organization."

At Carol Woods when we have a speaker from one party or the other we put the following disclaimer in the meeting announcement and also post it on the door to the room.

DISCLAIMER: Carol Woods is a 501(c)(3) organization under IRS regulations, and, as such does not in any way endorse, support or uphold the political views or political activities of any individual resident(s). The views and opinions expressed herein are those of residents in their individual capacity, and do not represent the views and opinions of Carol Woods.

This disclaimer would not apply to a candidate's forum where all candidates for an elective office are invited to participate. The moderator of such a forum must be careful to provide equal time for all candidates.

So back to my initial question of "when is a legislator simply a legislator?" Let's take this election year. To make certain that there is not a violation of IRS tax code, it would be safest to invite a legislator to speak to a general meeting of your CCRC following the general election in November 2016 and before they have filed to run again in January 2018. This 15-month period (from November 2016 to February 2018) would give you ample opportunity to discuss your interests and receive their point of view on these issues. Otherwise, you can use the posted Disclaimer notice and be in compliance with the tax code.

A NOTE FROM THE PRESIDENT

WHAT WOULD HARRY DO?

As I travel among CCRCs, I become more knowledgeable about the culture of individual CCRCs and become more engaged with NCCCRA activities. I am impressed with the energy, talent and creativity of our residents. Meetings I attended, meals I shared and lively conversations I joined with our cohort of residents in the past few months enhanced communication and connectivity.

I re-read Harry Groves' history. I was reminded of how he founded and named NCCCRA in 1989. He also traveled "hitting the road to build support." Just ten years later in1999 Harry helped form and name NaCCRA. Charlie Paulk, Executive Director of NaCCRA in 2009, remarked, "As I piece together our history, I stand in awe that so few could accomplish so much with such limited resources." Indeed, Harry's horizons extended far beyond North Carolina.

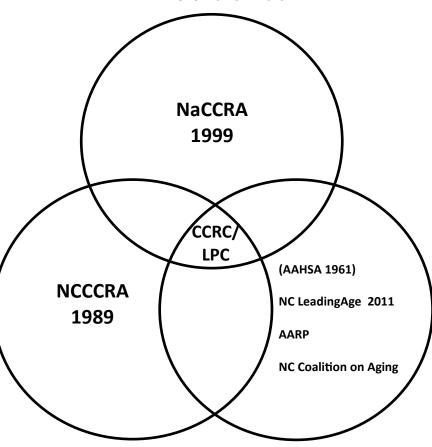
Now, I'm "hitting the road" to meet, greet and share the unique programs that exist in each CCRC. We residents, collectively, have come a long way, but we must not be complacent. We need to participate with collaborating agencies and our state and national organizations as we react to the changing environment. Thus, we can assure ourselves of continued security in our choice to live within the continuum of care in our CCRCs. Only then, will we ensure that the legislation Harry crafted will prevail.

I continue to think of Harry and what he would advise. By communication and connectivity, we can advocate, educate, serve, innovate and collaborate, as Harry would do.

Brenda Tremoulet



HARRY GROVES 1921-2013



Harry's World Updated

SAVE THE DATE OCTOBER 4, 2016
ANNUAL NCCCRA MEMBERSHIP MEETING IN GREENSBORO
Watch for details in the September Hotline

NCCCRA Eastern Region Meeting at Carolina Meadows

The Eastern Region of NCCCRA met on Wednesday, April 13, at Carolina Meadows in Chapel Hill. Fifteen CCRCs (two from outside the region) were represented and 183 members registered for the event.

The first topic, "Your Legacy: How to Leave a Gift and Not a Mess," provided an overview of a four-session program created by Carolina Meadows resident and management trainer Carolyn Holt. The program was a great success when offered at Carolina Meadows in 2013 and will be offered again this fall. The program features professionals from the various fields one needs to

consult when putting his/her affairs in order.

Assisted by Carolina Meadows Wellness Director Nancy Hudspeth, Carolyn presented a 21-page "Legacy Checklist" to help one ensure that he/she is in fact leaving a "gift and not a mess." The checklist covers the three primary situations in which one's affairs need to be in order: hospitalization, incapacity and death. It has two purposes: first, to help one track his/her progress towards having his/her affairs in order; and second, to make work done later by one's family, holder of the Health Care Power of Attorney, holder of the Financial Power of Attorney, and one's Executor/ Trustee as hassle-free as possible.

Copies were distributed to all in attendance and a flashdrive with the program, customizable for each CCRC, was given to the leader of each community delegation. Each community in the Eastern Region was also invited to send up to two residents to observe the four-session program when it is offered in the fall.

observe the four-session program when it is offered in the fall.

The second topic was "The Promise and Challenge of Aging in Place for CCRCs." Jim Hastings, an educator and teacher at Duke University's Osher Lifelong Learning Institute (OLLI), addressed the dilemma many seniors face — "Stay Put or Move On: Aging in Place or Moving to a Retirement Community." He presented the many considerations involved in the decision, including the practical realities of living at home when compromised and discussed the various alternatives, such as homecare or life-care communities and CCRCs. The central message to seniors facing the decision was clear: "do your homework" and make an informed decision.

With some 90 percent of people over age 65 saying they would like to stay in their homes for as long as possible and 80 percent believing their current residence is where they will always live, their final decisions clearly will have an impact on the CCRC model.

Carolina Meadows CEO and Chairman of the Board of Leading Age North Carolina, Kevin McLeod, addressed this challenge in his presentation, "CCRCs: At the Crossroads and Crossfire of Aging in Place." With seniors now living longer and healthier and preferring to remain in their homes as long as possible, the age at which they seek to enter a CCRC will rise. Meanwhile, those already residing in CCRCs are remaining in independent living longer, reducing the demand for higher levels of care. This may disrupt the balance in the CCRC between independent living facilities and the higher costs of the assisted living and skilled nursing facilities. This may negatively affect the existing financial model and requires that CCRC management be increasingly strategic as it seeks to meet resident needs and the cost of service.

At its business meeting, the following members, all from Scotia Village, were elected as officers of the Eastern Region for 2016-17: John Olmstead (chair), Geoffrey Taylor (vice chair), Jean Snively (secretary), and Bob Bedingfield (treasurer).

Prior to the meeting, there were walking tours of the Carolina Meadows facilities. Following the meeting, three busloads of participants toured the Carolina Meadows campus.

An Informational Session on NaCCRA and its proposed relationship with Leading Age was also held following the meeting and attracted a large audience.

Judith Pulley, Carolina Meadows

Central Region Annual Meeting

The Central Region Annual Meeting was held at Friends Homes West in Greensboro on April 21, 2016. The theme of our program was "Staying Prepared for the Next Legislative Challenge". We had over 80 attendees including residents from all ten of the participating CCRC's in our region and guests from the Eastern and Western Regions. We were welcomed by the Administrators from Friends Homes East and Friends Homes West. Attendees were also welcomed by our NCCCRA State President Brenda Tremoulet who gave a very informative presentation on her approach to dealing with the problem of hospitals increasing practice of placing patients in observation status for several days rather than admitting them as inpatients. This practice can lead to Medicare payment denial for step-down care in a nursing facility since the patient has not been admitted as an inpatient for three nights before moving to nursing home care. Sindy Barker, NCCCRA Legislative Committee Chair led an active discussion of possible items coming up in the next legislative session. She encouraged us to stay in contact with our legislators and be sure we have thanked them for their decision on reinstating the medical deduction on NC state income taxes. NaCCRA President-Elect Walt Boyer gave an update on the activities of the National Continuing Care Residents Association. Representatives from the Carol Woods NCCCRA Interest Group distributed information regarding the possibility of the National Residents Association entering into a written working agreement with LeadingAge. Ginger Clifford, CoRep from the Carol Woods NCCCRA interest group, elaborated on their concerns and answered questions. Walt Boyer also spoke to the issue and presented pros and cons from his point of view. He reported that the issue is only in discussion at this point by a committee with members from NaCCRA and LeadingAge. The primary concern expressed by most who spoke was that we insure that we did not compromise in any way our ability to take a stand against any action favored by the administrators that we did not believe was in the best interest of residents.

Randall Edwards, Central Region Chair

Western Region, NCCCRA Annual Meeting, April 19, 2016

Clinton Smoke introduced Wendy H. Marsh and John Wingerter from the Council of Aging of Buncombe County Inc., who made a presentation about their organization which serves 8,000 people in the county and is located at Deerfield.

Tom Akins, CEO of Leading Age NC, discussed Demographics, Realities, and Raleigh. Since CCRCs are a \$1.7 billion input on NC economics, and projected to grow to \$3.2 billion by 2034, he suggested we look at ourselves as business with a large impact on our state. Realities was about market segmentation of our CCRC population. New residents are used to eating out with lots of choices vs. our current population which prefers "fine dining." New residents may not even expect CCRCs to provide dining for them. The Raleigh focus was about the upcoming challenges in our legislative sessions and what we need to watch for.

Jim Chatham gave a brief exercise on *Turning Your Life into Literature*. Brenda Tremoulet discussed the "Admission vs. Observation" issue with hospitals.

Glenn Lloyd, chair of Western Region NCCCRA conducted the business meeting

The Treasurer's report (on pages 7-8) was approved. Carol Lloyd was appointed interim Treasurer. Linda Furr has stepped down as Vice Chair and Tom Sigmon accepted

Continued on Page 6

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North Carolina Continuing Care Residents Association Financial Status Report - Oct 1, 2015 - April 30, 2016

	Α	В	С	D	E
1					
2					
3		2014-2015	2015-2016	April 30,	
4		Actual	Budget	Actual	Percent
	INCOME	1			
6	Membership Income	70 100 00	1-000		
7	Total Membership Dues Income	58,490.00	17,200.00	21,228.00	123.42%
8	(Deferred Dues Allocation)	-41,090.00	-7,200.00	-7,938.00	110.25%
9	(Credit Dues Deferred Previous Years)	6,350.00	14,327.00	14,627.00	102.09%
10	(NET Current Membership Income)	23,750.00	24,327.00	27,917.00	114.76%
11	Annual Meeting Registration Fees	944.00	1 200 00	4 906 00	145 050/
13	Interest Income	2.26	1,300.00 2.00	1,896.00 1.13	145.85% 56.50%
14	Gifts Received	74.00	0.00	10.00	30.30%
15	Refund	74.00	0.00	0.00	
16	TOTAL INCOME	59,510.26	18,502.00	23,135.13	125.04%
17	TOTAL INCOME	39,310.20	10,302.00	23,133.13	123.0476
	EXPENSES	1			
19	Annual Meeting				
20	Annual Meeting Expense	2,975.36	3,000.00	2,230.58	74.35%
21	(Less Meeting Registration Fees)	944.00	1,300.00	1,896.00	145.85%
22	(NET Annual Meeting Cost)	2,031.36	1,700.00	334.58	19.68%
23	,	_,,,,,,,,	.,		10.0070
24	Board & Exec Comm Meetings	1,424.01	1,504.00	267.56	17.79%
25	•			1,111	
26	CCCR Communications				
27	Hotline Expense	11,871.02	11,000.00	4,369.18	39.72%
28	CCCR Website/ Brochure	855.80	1,500.00	1,510.57	100.70%
29	TOTAL CCCR Communications	12,726.82	12,500.00	5,879.75	47.04%
30					
31	Membership Expense				
32	Refund of Membership Overpayments	50.00	0.00	24.00	
33	Membership Development	0.00	800.00	0.00	0.00%
34	Membership Services	3,900.00	3,900.00	2,925.00	75.00%
35 36	TOTAL Membership Exp	3,950.00	4,700.00	2,949.00	62.74%
37	Administrative Expenses	203.52	250.00	205.11	82.04%
38	Naminou duve Expenses	200.02	230.00	203.11	02.0470
39	Related Organizations	1			
40	Dues to Other Organizations	500.00	500.00	600.00	120.00%
41	Organization Representation	0.00	1,500.00	1,500.00	10000000000000000000000000000000000000
42	TOTAL Related Organizations	500.00	2,000.00	2,100.00	
43	ů				100.0070
44	Dues Alloc'n to Regions				
45	Central Region	0.00	0.00	78.00	
46	Eastern Region	204.00	0.00	907.00	
47	Western Region	391.00	0.00	785.00	
48	TOTAL Dues Alloc'n to Regions	595.00	1,675.00	1,770.00	105.67%
49					
50	TOTAL EXPENSES	22,374.71	25,629.00	15,402.00	60.10%
51					
52	SURPLUS / DEFICIT	37,135.55	-7,127.00	7,733.13	-108.50%

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North Carolina Continuing Care Residents Association Financial Status Report - Oct 1, 2015 - April 30, 2016

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		of our funds are reserved for future years.					

Continued from Page 4

the interim appointment to fill out her term. Glenn Lloyd stressed the need for nominations for upcoming officer openings.

Sindy Barker, Chair of NCCCRA Legislative Committee, discussed efforts to get letters and info out on the NC Tax Issue.

Ginger Clifford gave a handout about the results of an Interest Group at Carol Woods regarding the relationship between NCCCRA which represents residents and Leading Age which represents owners of CCRAs. She also talked about increasing membership efforts in the Eastern Region and how they have been successful in doing that.

Glenn appealed for information on current Community Representatives from the CCRCs present. His contact list is inadequateThe next WNC Annual Meeting will be April 18, 2017 at Tryon Estates.

Sharon Everhart, Secretary

Potpourri

Kathy P. Foster

On a walk I stopped to talk to a passerby we chatted for a while as we watched the world go by.

> she asked me what my name was where I came from what's my sign?

I said, I am a Pisces
I'm French and English too
I'm Portuguese, Italian
with a little French Sioux.

Oh dear! She said, and chuckled A mutt I said, that's me! Oh no, she said with kindness My dear, you're Potpourri!

SPRING HAS SPRUNG AT SEARSTONE!

Jewel Tolan, resident

The chill of winter has come and gone, knockout roses have bloomed, day lilies have opened with golden petals, and the crepe myrtles, coated in green, have begun to bud. Once again, bluebirds and cardinals flutter back and forth to neighborhood feeders. We have had some gloriously sunny days, and at SearStone we can truly agree, "Spring is nature's way of saying, let's party." It's with that spirit of spring's new possibilities that residents have been seen walking through the community or touring a garden, taking fly fishing classes and golf clinics, participating in senior games, planting the community flower bed, or boating on Jordan Lake. In addition to these more physical pursuits, residents have often headed to the ballroom to attend a variety of special events, ranging from wellness lectures to themed dinners.

One of those events, 'SearStone's Got Talent,' was a first for our community—and is sure to become an annual show. Activities Director Shannon Hoffman introduced the entertainment which was provided by residents and staff. The performers mellowed, soothed, crooned, humored, and awed their friends and neighbors with their creativity and talent.

The SearStone Chorus, caught up in our community's March Madness and sporting school colors, opened the show with a medley of songs about North Carolina that ended with a melody entitled "Home, Home at SearStone." Sung to the notes of "Home, Home on the Range," it was written by chorus member Joan Angevine and was an instant hit with the audience. Through her light-hearted lyrics, Joan had captured the love of community and life in a CCRC!

"Home Home at SearStone"

Oh give me a suite, where all is complete and now there's a beautiful lake, With a pool and a gym, to help me keep trim right here in the county of Wake...

Refrain: Home, Home at SearStone, in Winston, Lorraine and Calais on Walker Stone Drive, you surely will thrive. You'll be glad you have come here to stay.

Oh give me a home where some residents roam on walkers and canes down the hall. There are puzzles to make, or yoga to take and a button to push if you fall.

Refrain: Home, Home at SearStone, etc.

Chris gets lots of emails, Leigh makes many sales, and Mark helps us strengthen our cores.
Kelly shampoos our hair, Shannon takes us ... everywhere. and Ken checks out all of our floors.

Refrain: Home, Home at SearStone, etc.



SEARSTONE STORMED THE SENIOR GAMES

JoAnn Harrington, SearStone resident and competitor

Cary's SearStone Continuing Care Resident Community (CCRC) supported the Wake County Senior Games and Silver Arts for the second consecutive year. As the area's newest CCRC, this year it more than tripled its number of participants in the games. A bus was used to transport participants as well as residents cheering on friends to the competition at Crabtree Valley Mall. Nineteen residents participated in several events taking 27 gold, bronze and silver medals.

Encouraged by Mark Johnson, the community's Wellness Coordinator, many seniors competed for the first time in their lives. Instead of cheering on children, children supported parents and grandparents trying to secure a medal. Resident support for each other was also evident.

Games entered ranged from corn hole to tennis and even a singing competition. Fourteen different events were attempted. New friends were made from other areas in Wake County in anticipation of continuing to compete among other senior groups during the year.

The Senior Games provide an excellent way of staying fit, engaging in the Wake County community and measuring one's ability against others in the same age group. Many residents are planning on competing at the next level in September.



The *Hotline* is published quarterly, March, June, September and December by Bernard S. Coleman, Deerfield Episcopal Retirement Community, Asheville, NC, for NCCCRA President Brenda Tremoulet, 16 Salisbury Drive, #7116, Asheville, NC 28803 (828-505-1719)-brenda.tremoulet@gmail.com). Submissions to the *Hotline* and other *Hotline*-related communications should be addressed to the editor, Bernard S. Coleman (gothic63@charter.net).

www.NCCCRA.org

The NCCCRA home page is your source for information.

Check it out!

Membership Application

One-year membership is \$12 for an individual, \$20 for a couple. Life membership is \$80 for an individual. Checks should be made payable to NCCCRA and given to your community's NCCCRA 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 NCCCRA representative is, you may find out by contacting NCCCRA President,

Brenda Tremoulet, 16 Salisbury Drive, #7116, Asheville, NC 28803; (828) 505-1719; brenda.tremoulet@gmail.com.

If your community does not have a representative, mail checks to:

NCCCRA, c/o Susan Rhyne, 3913 Muhlenberg Court, Burlington, NC 27215.

The form below is provided for your convenience.

APPLICATION FORM (please print or type)	For membership year	2016
(Your name)	(Spouse's name, if applicable)	
Community		
Address		
Email		
Status (please check one): Renewal	□New member	
Enclosed is payment for (please check one):		
One year: □\$12 single □\$20 couple	Life : □\$80 individual.	