

## **Celebrating Harry E. Groves**

On November 11, Carolina Meadows hosted a panel discussion and reception for residents of the community as well as NorCCRA members and family and friends of Harry Groves. The celebration had been planned for March 2019 only to be put on hold because of Covid. His portrait had been painted, the panel chosen, and the guest list prepared.

For much of his career, Harry was Dean of the School of Law at NC Central University (NCCU), but he is known best to CCRC residents as the author of Chapter 58-64, Continuing Care Retirement Communities.

However, there is a silver lining to this three-year delay. The NC Department of Insurance (DOI) has been working on a total rewrite of Chapter 58-64 to be introduced in the 2023 session of the NC General Assembly. Harry Groves' original statute passed the legislature in 1989; a lot has changed in North Carolina's CCRC community in the past 30+ years. For the past nine months, the nine members of the NorCCRA Legislative Workgroup have studied every word of Harry's 16-page original legislation and carefully compared it to the 78 pages of newly proposed legislation.

But back to the celebration on November 11. Margaret Zircher and a team of Carolina Meadows residents and one of Harry's former law students put together a panel of friends and colleagues who had benefited from their time at NCCU. Most of us know Harry's story with the CCRC statute, but these five panel members told of his impact on them as individuals. Two became judges (one now retired), two are corporate attorneys, and one retired after 41 years on the faculty at NCCU and is now an Early Advantage resident at Carolina Meadows. They all spoke warmly of Harry's intelligence, wit, and his ability to inspire them to become who they are today. It was a wonderful tribute.

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## *2022 Annual Membership Meeting*

On October 4, NORCCRA members and guests attended the 2022 Annual Meeting held by ZOOM. There were over 200 members, guests and speakers registered to attend the meeting. The theme of the meeting was information, information, information.

The keynote speaker was Mr. Jeff Trendel, Deputy Commissioner of the NC Department of Insurance (NCDOI). NCDOI is the North Carolina State agency that is charged with regulating Continuing Care Retirement Communities. Mr. Trendel opened his presentation with an overview of statistical data relative to the current CCRCs operating in North Carolina.

There are 63 licensed Continuing Care Residence Communities operating in 22 counties. These facilities are home to 22,349 residents. Nonprofit financial models represent 49 of the 63 CCRCs, with the remainder being either for profit or a combination of both models.

Mr. Trendel's next topic was consumer information available to residents and prospective residents through the NCDOI Reference Guide. He was especially concerned that residents and prospective residents are not reading the Disclosure Statement which is produced and provided by every CCRC annually. Mr. Trendel posed two questions to this audience:

- 1) How do we get more residents to read the Disclosure Statement, and
- 2) What can we do to help them better understand the financial statements?

Mr. Trendel also explained the oversight that NCDOI provides through the licensing procedures in controlling the building of CCRC facilities and regulating their operation. NCDOI's focus is the financial health of the CCRCs. Mr. Trendel discussed the role that Harry Groves played in getting the original CCRC statute passed in 1989. (See the front page article on Harry Groves.)

Mr. Trendel gave a detailed discussion of the CCRC Legislation Task Force which is charged with rewriting Article 64. The purpose of the CCRC Legislation Task Force was to review the NCDOI's draft rewrite of Article 64, Chapter 58 of the North Carolina General Statutes and provide feedback and suggested changes. There are 13 parts to the proposed new statute and each part added significant items including many NorCCRA requested requirements for additional notifications and disclosures. (To request a complete copy of Mr. Trendel's slide presentation, email Skip Kingan, [skingan47@gmail.com](mailto:skingan47@gmail.com).)

Following Mr. Trendel's presentation, NorCCRA's Legislative Chair Sindy Barker moderated a panel of executives from three CCRCs operating in NC. One of the topics of interest to all was the current and expected increases in monthly fees that residents must pay. Without exception, the panel participants said that such

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## President's Message.....from Skip

John Olmstead, thank you for what you have done. Your tenure as President of NorCCRA has been amazingly productive. Somehow you managed to lead us out of chaos just in time to tackle some of the most important issues impacting residents of CCRCs since Harry Groves campaigned for the Continuing Care Retirement Community Act. All of the resident members of NorCCRA are very appreciative of those efforts. I have now assumed the role of President and that will hopefully allow you to enjoy a more relaxed retirement lifestyle.



NorCCRA on the other hand is not done. There is much yet to do relative to the proposed rewrite of Article 64 of Chapter 58 of the North Carolina General Statutes. We must keep a watchful eye on the status of the rewritten statute as it passes through the various stages necessary for it to become state law. We must continue to fight for an equitable solution to the sales tax issue that that has been festering for the last few years. Those two issues occupied the majority of our time and energy in 2022, but we must stay vigilant and prepared for the next challenges that lie ahead.

During our “spare time” in the past year, we worked on increasing our membership. We focused on CCRCs which had few or no members. Bob Osborn, Western Region Leader, David Teal, Central Region Leader, and Virgil Torbert, Recruiting Committee Chair, have done an excellent job of working with the three regions to add new CCRCs and their residents to NorCCRA’s membership. Those efforts will continue throughout this coming year.

Our bylaws state, “North Carolina Continuing Care Residents Association is a **voluntary**, IRS Section 501(c)(4), not-for-profit organization **created and organized by residents** of continuing care retirement communities. I emphasize voluntary and created and organized by residents because without those, NorCCRA does not exist. To that end I have asked Sharon Everhart, NorCCRA Vice President, to work with the community representatives to help us identify and recruit future volunteers and leaders.

I do want to thank all the community representatives, officers, appointees and the various committee members that contribute to make NorCCRA a vibrant organization. An organization is only as strong as its ability to attract volunteers and leadership. We are always in search of new talent to maintain NorCCRA’s strength.

In closing, Jeanne and I want to wish everyone a Happy and Safe Holiday Season.

## *Legislative Update ..... from **Sindy***

### *Revision of the CCRC Statute NorCCRA Legislative Workgroup*



Almost four years ago on March 5, 2019, Jeff Trendell, Deputy Commissioner of the NC Department of Insurance (DOI), told members of the Continuing Care Advisory Committee that the DOI had begun to work on a total revision of Chapter 58-64, Continuing Care Retirement Communities. Their initial plan was to introduce a bill in the 2021 legislative session. We all know that almost immediately after that meeting, Covid struck and practically no one met in person for the next three years.

In December 2021, Jeff got in touch with NorCCRA and asked us to recommend residents to serve on a DOI Task Force on Legislation. He had already identified the two resident members of the Advisory Committee, the NorCCRA President and NorCCRA Legislative Chair. We nominated five additional members. They appointed one from our group of nominations. DOI formed a 20-member Task Force, composed of five residents and the rest were CCRC management or advisors or consultants to management. The first and only in-person meeting was in February 2022.

The goals of the Task Force were to provide the same or more protection to residents than currently exists, to not be unnecessarily burdensome to providers, to more clearly state the provisions of the statute, and to have the full support of both residents and the industry.

NorCCRA decided to put together a Legislative Workgroup to better handle the work that we anticipated would be needed. It is composed of the five members who were named to the DOI Task Force as well as the four NorCCRA members we had nominated to serve on the Task Force.

By the end of March this year, we began to suspect that perhaps this was going to be an overwhelming task. We also realized that it would be virtually impossible to bring any new member up to speed even after only five weeks of work.

The workgroup met via Zoom every week for nine months and five of the members met every other week with the DOI Task Force.

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## Meet your NorCCRA Officers:



**President:**  
**Charles (Skip)**  
**Kingan**



**Vice President:**  
**Sharon**  
**Everhart**



**Secretary:**  
**Margaret Riley**



**Treasurer:**  
**Joe Liegl**

### 2022-2023 NorCCRA OFFICERS

President: Charles "Skip" Kingan  
Croasdaile Village skingan47@gmail.com  
Vic President: Sharon Everhart  
Gace Ridge everhartjd@gmail.com  
Secretary: Margaret Riley  
Croasdaile Village mrileync@gmail.com  
Treasurer: Joe Liegl  
Carolina Meadows

### Members of the Executive Committee

John Olmstead, Past President  
Scotia Village, olmsteaj@erols.com

Bob Osborn, Western Region Leader  
The Pines at Davidson, -  
rho.cincy60@gmail.com

David Teal, Central Region Leader  
Well Spring, - teal david@gmail.com

Margaret Keller & Carol McFadyen  
Eastern Region Co-Leaders  
The Forest at Duke  
kellerpair@aol.com. carolmcf@nc.rr.com

Sindy Barker, Legislative Affairs  
Carol Woods, -  
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Susan Rhyne, Membership Director  
Twin Lakes - morhyne@bellsouth.net

Bill Lambe, Presidential Appointee  
Croasdaile Village, - whl@walkerlambe.com

Margaret Zircher, Presidential Appointee  
Multi-State Continuing Care Resident  
Association Leadership Group  
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Jamie King, Hotline Editor/Publisher  
Trinity Oaks, - kj4jk@arrr.net

## 2022 Annual Membership Meeting

*Continued*

increases are definitely part of the expected future. Historically, fee increases have been 3-5% annually, but that percentage is expected to increase in the next couple of years as the costs of maintenance, employees, and food all are all on the rise.

In summing up, there was optimism about the future of Continuing Care Retirement Communities. Resident numbers are increasing in spite of COVID, inflation, and other pressures.

New facilities are expected to continue being built, and many of the existing facilities will expand their capabilities. After a short recess, the business meeting commenced with approval of minutes from the October 2021 annual meeting and the 2022-2023 annual budget. A report was given by Margaret Zircher on the activities of the Multi-State Continuing Care Residents Association Leadership Committee, and a Legislative Report by Sindy Barker. Clint Willis gave a report from the Nominating Committee. Nominees were Skip Kingan, President; Sharon Everhart, Vice President; Margaret Riley, Secretary; and Joe Liegl, Treasurer. The nominees were elected by acclamation. Before adjourning the meeting, Skip Kingan presented John Olmstead a plaque commemorating his four years as vice president and president.

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### *NorCCRA Legislative Workgroup (continued)*

So, I engaged in a little math. I figured (as a conservative estimate) that we each worked an average of 20 hours a week ( $9 \times 20 = 180$  hours). We did this over 38 weeks ( $180 \times 38 = 6,840$  hours). A full-time employee works 2080 hours. If that full time employee had worked  $\frac{3}{4}$  of a year, he/she would have worked 1,560 hours. Therefore, we divided 6,840 hours by 1,560 hours and realized that we, a troupe of committed volunteers, had done the work of 4.38 full-time employees.

Impressive you might say – exhausting is what we say.



NorCCRA Legislative Workgroup (L to R)  
Bob Osborn, The Pines at Davidson  
Sindy Barker, Carol Woods  
John Olmstead, Scotia Village  
Sharon Everhart, Grace Ridge  
Skip Kingan, Croasdaile  
Clint Willis, Scotia Village  
Margaret Zircher, Caroline Meadows  
Absent from photo  
Joe Liegl, Carolina Meadows  
Bob Mack, Windsor Run

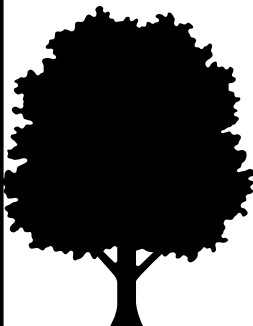
## A note to NorCCRA Members:

We are facing inflation on all sides. Things cost more every day. The printing costs for The Hotline are expected to increase by 10% in 2023. Shipping and mailing costs are also increasing. Here is some "food for thought" for you:

Your NorCCRA Community Rep receives an electronic copy of *The Hotline* about two weeks before the final paper copies are printed. You can request him/her to send you an electronic copy by email and not give you a printed copy.



*The officers and staff  
of NorCCRA wish  
every member a safe  
and happy holiday.*



## KUDOS

*ArbNet*, an international accrediting agency, has accepted an application from The Pines at Davidson to be certified as an accredited arboretum, one of only 359 in the world. Congratulations to the resident group PNO, who have done the preparation work.

## 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 make significant changes 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..

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As you may know, NorCCRA is the one and only North Carolina organization that focuses entirely and exclusively on the needs and interests of CCRC) residents, and monitors state rules and regulations concerning each CCRC's financial viability.

We are an organization staffed by volunteers, and for our continuing viability we need to fill leadership roles with members that understand what is required in these positions. Accordingly, we have developed job descriptions for each of these important positions. Each CCRC Community Representative has access to these position descriptions.

If you might be thinking about working with us for the benefit of all CCRC residents, please let your Community Representative know about it today.



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### 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.**