



September 2022

The Hotline

A VERY IMPORTANT NOTICE!

Annual Meeting

Tuesday, October 4 at Croasdaile Village

NorCCRA will hold its first in person meeting in over 34 months. Croasdaile Village Retirement Community has invited all NorCCRA members to attend the meeting to be held Tuesday October 4 at Croasdaile Village, located at 2600 Croasdaile Farm Parkway, Durham. As a precaution to Croasdaile Village residents and all members traveling to the meeting, we suggest wearing face masks during the meeting. Check-in, coffee and socializing will begin at 8:30 AM with the opening of the meeting scheduled for 9:00. See pages 5-8 for the agenda, preregistration form and proposed 2023 NorCCRA officers (Note the deadline for registering is September 27). We highly encourage attendance at this event. We have many new members and old friends to meet and greet. We will also provide a broadcast by Zoom for those of you who are unable to make the trip.

Our first speaker will be Jeff Trendel, Deputy Insurance Commissioner, NC Department of Insurance with information related to the rewrite of the Continuing Care Residents Community Statute. The second set of speakers will be an executive panel made up of Tim Webster, President/CEO of Brightspire, Pam Fox, President/CEO of Twin Lakes Community, and Craig Huggins, Co-owner of Cypress of Raleigh. The panel will respond to questions submitted by NorCCRA members, primarily related to managing CCRCs in today's environment. Our own Cindy Barker will moderate the panel.

HEADS UP!

The General Assembly did not include our CCRC sales tax exemption in either the 2021 budget or in the amended version this year. Details inside on page 2.

The Hotline is published quarterly, in March, June, September and December by the North Carolina Continuing Care Residents Association.

Submissions and other Hotline-related communications should be addressed to the editor: Jamie King, Trinity Oaks, Salisbury, NC, kj4jk@arrl.net.

*Legislative Update from **Sindy***

NorCCRA and LeadingAge NC have been working together on two issues important to CCRC residents. The first is the sales tax exemption which is now in its third year of discussion. The second is a total revision of the CCRC statute. The Department of Insurance has put together a Legislation Task Force composed of five NorCCRA members, five LeadingAge NC members and ten people (primarily consultants) who work in the senior living industry with CCRC management. A brief explanation of both follows.



Sales Tax Exemption:

Throughout this three-year long process, the Senate and House of Representatives have waxed and waned in terms of their individual support. The sales tax exemption for CCRCs was included in the House budget in 2022, but it was pulled out in the Senate. The General Assembly passed the budget without our exemption and went home in late June.

Toward the end of the session, another mechanism was suggested – our language would be included in an Alcohol and Beverage Control bill which would then be taken up by a conference committee composed of members of both houses. It is our understanding that the original conference committee report was 24 pages long (and included our sales tax exemption along with a lot of other provisions that were important to other groups). The conference committee reduced it to five pages and again the sales tax exemption was left out. (Note: Once a conference committee report comes to the floor, it is voted up or down with no possibility of amendment by the full General Assembly.) That bill passed both chambers of the General Assembly in its abbreviated form and was signed into law by Governor Roy Cooper

There is a possibility that the issue could be addressed administratively by the end of the year. If that is successful, LeadingAge NC still feels we should go ahead and get a simple bill introduced in the long session so the sales tax exemption would be a part of North Carolina statute and not subject to interpretation by the Department of Revenue.

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Legislative Update

continued

CCRC Statute Revision:

The CCRC Statute was adopted in 1989 and has needed an overhaul for some years. This revision is incorporating the Administrative Code as well as addressing some of the issues that are of particular concern to for profit CCRCs which have begun to come into the state in larger numbers. The original statute was 16 pages long. The proposed revision is 96 pages long. The Task Force has been reviewing and making proposed changes on the 13 Parts that have been presented to us. The goal of the Department of Insurance is to finish the revision by the end of September. They are hopeful that all members of the Task Force can reach consensus on the provisions, but their fallback position is to retain the language in the current statute for any provision where there is no agreement. The plan is for the Department of Insurance to have the revision introduced in the 2023 long session of the General Assembly

Members of the Task Force have been asked to keep our deliberations confidential, so we have been doing that. As soon as we can let our NorCCRA members know, we will do so. Thank you for your patience.

NorCCRA is planning an educational campaign this fall and are encouraging CCRCs to hold Candidate Forums, so the candidates get a sense of who we are and what we do.

Candidates' Forum at your CCRC

Many CCRCs already have candidates' forums scheduled for September and October. The NorCCRA Legislative Committee feels this is a perfect time to educate the candidates about the CCRC in their community. The Committee is preparing materials for you. As you can see by both the Legislative Update and the President's Message, we have a lot of important issues to convey to our candidates. Please let [Sindy Barker](mailto:sindydevoebarker@gmail.com) know if you are having a forum so she can send you the candidate materials.

Her email address is sindydevoebarker@gmail.com.

President's Message.....*from John Olmstead*

This is my last President's message following 22 months as NorCCRA Vice President and 26 months as President. Time flies! Especially when you are busy. I don't know how much space they have allocated for me since this is a 12-page information packed issue, so some of my comments may be left on the cutting room floor.



First of all, I must thank the many volunteers who save NorCCRA tens of thousands of dollars each year. That's what it would cost to hire all the functions needed to support this organization of nearly 5,000 members. We have close to 100 volunteers making NorCCRA what it is, and the need for volunteers at all levels is continuous. One of the real benefits in living the CCRC lifestyle is the varied backgrounds and experiences of the residents. This would appear to be a very rich environment for the solicitation of volunteers for the many opportunities and functions that benefit our residents. In the real world, however, there are many reasons why finding volunteers is quite difficult. "I'm retired, and am not willing to commit my time/efforts," "I've volunteered all my life, and not going to do it anymore," "I've never volunteered, and don't plan to start now," etc. As many of us have discovered in our earlier lives, if you need something done, just ask a busy person.

I came into this job with an open and active mind. I had a plan, and still do. Like in real life, speed bumps are frequently encountered. One of the unscheduled events that occurred was the result of a decision by the North Carolina Department of Insurance (DOI) to update Article 64 of Chapter 58 of the North Carolina General Statutes (NCGS 58-64), the NC statute that governs CCRCs. I embraced this event as a great opportunity to voice the needs of residents and assure the new, nearly 100-page proposed replacement statute contains at least the same protections that have made the old statute a model for several states around the country.

The CCRC industry has evolved significantly since the current 17-page NCGS 58-64 was written over 30 years ago. During the 1980's most CCRCs were owned by non-profit organizations (churches, etc.). Many of the newest CCRCs are now owned and operated by for-profit corporations. Other business models for CCRCs have also evolved including rental CCRCs (which typically have no "buy-in" charge or entrance fee) allowing residents to preserve their real estate and other investments until needed for future health care expenses. After an initial contract term of 13 months, month to month contracts are normal for these rental CCRCs.

Continued ->

One of my concerns is that I believe a continuing care contract should continue for a person's lifetime – and at the same location. However, this is not the case for all licensed CCRCs because of current statutory language and is not likely to change going forward. Therefore, it is imperative for there to be proper disclosure to all future residents, so they completely understand what is and is not included within their continuing care contract. Also, fee-for-service (à la carte) communities continue to grow. For the past twelve years, CCRCs have been able to provide a program (known in NC as “continuing care without lodging”) allowing future residents to remain in their home with the promise of health care provided by their CCRC when needed before actually becoming a resident on the CCRC campus. Another similar model has emerged utilizing the “continuing care without lodging” section of current NCGS 64 which allows older people to stay in their homes while the continuing care provider provides, either directly or indirectly through a contractual relationship with another entity, services, including care coordination and health care services either at the CCRC or other health care facility in a location of their choice.

The speaker and executive panel at the Annual Meeting on October 4th will discuss some of these nuances and developments. Specifics of what I would like incorporated in the updated statute include: a two to three page “Residents Bill of rights” to be attached to all new CCRC contracts, or at least provided at the time a continuing care contract is signed; an equal number of residents and providers on the DOI Continuing Care Advisory Committee (currently there are only two residents of the nine members); the inclusion of resident(s) on the provider's Board of Directors (at least at the local level); and CCRC Disclosure Statements filed with the DOI in a much timelier fashion. (currently these statements are required to be filed within 150 days after the provider's fiscal year end, and remain effective for a year, making them a year and a half old before a new disclosure statement is required to be filed).

What did we not accomplish? 1.) I had hoped to rejuvenate the Western and Central regions with their own elections and annual meetings. I appointed leaders (vice chairs) to these regions, and those leaders have done a yeomen's job in restoring the regions. Hopefully these efforts will continue. 2.) I planned to validate and implement the entire NorCCRA Strategic Plan which was formulated several years ago. This effort morphed into a lesser effort when we discovered we were missing basics like job descriptions, basic operating and budgeting procedures, recruiting processes, and administrative record keeping. I believe we have resolved all those issues, and are now ready to attack the entire strategic plan.

In closing, I am a faithful believer in NorCCRA, and wish we could communicate its true value to all NC CCRC residents. Thank you for your past and continuing support!

John Olmstead



NorCCRA Annual Meeting

All NorCCRA members are invited and encouraged to attend and this important annual meeting

When: Tuesday, October 4, 2022

Where: Croasdaile Village Residential Community,
2600 Croasdaile Farm Parkway, Durham, NC

We haven't been able to attend an in-person NorCCRA meeting for three years – so line up the CCRC bus and bring you and your fellow residents to Durham

Croasdaile Village is treating us to lunch!!

To Register for the live meeting, email your name, email address, CCRC and any dietary restrictions to register4oct4@gmail.com

For those unable to travel, a ZOOM broadcast will be available

To Register for ZOOM, email your name, email address and CCRC to skingan47@gmail.com

Please Register by Tuesday, September 27, 2022

Questions? Email Skip Kingan, skingan47@gmail.com

Annual Meeting
Croasdaile Village, Durham NC
October 4, 2022



General Session Agenda

8:30 – 9:00 AM Check-in, Refreshments, Socialization and Seats

9:00 AM Welcome and General Information Ms. Heather March, Executive Director

9:05 AM Meeting Called to Order

- **Welcome, Acknowledgements and Comments** John Olmstead

9:15 AM Introduction of Keynote Speaker John Olmstead

Mr. Jeff Trendel, Deputy Insurance Commissioner, NC Department of Insurance

10:15 AM Short Stretch / Rest Room Break

10:30 AM Introduction of Executive Panel John Olmstead

Ms. Sindy Barker - Moderator - Chair NorCCRA Legislative Committee

Mr. Tim Webster, President/CEO Brightspire

Ms. Pam Fox, President/CEO Twin Lakes Community

Mr. Craig Huggins, Partner Cypress of Raleigh

Approx. 11:30 – Lunch Break in this room, courtesy of Croasdaile Village

Business Session Agenda

Approx. 12:15 - Call to Order – Quorum John Olmstead

Approval of Minutes of Oct 12, 2021 Annual Meeting

Budget Report/ Adoption of 2022 - 2023 Budget Joe Liegl – Treasurer

Multi-State Continuing Care Residents Assn Leadership Report Margaret Zircher

Legislative Report Sindy Barker, Chair Legislative Committee

New Business Anyone?

Nominating Committee Report / Floor Nominations Clint Willis – Past President

Election of Officers -Affirmative vote by a majority of members attending and voting

Installation of Elected Officers Clint Willis – Past President

Meeting Adjourned new President

Nominees for 2023 NorCCRA Officers



For President: Charles "Skip" Kingan

Skip has been a member of NorCCRA since moving to Croasdaile Village in 2019. The Croasdaile Village residents elected him to the Croasdaile Village Residents Council as the Croasdaile Village NorCCRA Representative. In October 2020 Skip was nominated and elected to the office of Treasurer for NorCCRA and in October 2021 he became the NorCCRA Vice President.

Skip retired from Liggett Vector Brands LLC in 2015 as Senior Vice President of Operations and Finance in Mebane, North Carolina. He was also a member of the board of directors. He is a graduate of The University of Texas at Arlington with a BBA in Accounting.

For Vice President: Sharon Everhart



Sharon spent 23 years with Exxon and 12 years with Carteret Community College. Her experience covers a wide variety of management and employee relations specialties. She has also had specialized training as an organizational facilitator.

Sharon has worked with a variety of people -- from the Teamsters Union to research scientists, from volunteers to corporate executives and county governments. She was a founding member of the League of Women Voters of Carteret County in North Carolina, and served a two-year term as it's president.

Sharon holds an M.B.A. in Management from the University of North Carolina at Greensboro and a B.A. in English from Woman's College, Greensboro, NC.

My husband and I were married for 51 years. Don died in 2013. Both of us were born and raised in North Carolina. Grace Ridge CCRC has been my home for the last 8 years, and I love it.

Nominees for 2023 NorCCRA Officers
Continued

For Secretary: Margaret Riley



Margaret retired from Duke in 2013 as Director of the Global Education Office for Undergraduates, Associate Dean of Trinity College, and Assistant Vice Provost for Global Undergraduate Education. Previously she has held similar positions at Western Michigan University and at St. Norbert College.

She is single, from a large family who live primarily in the Midwest. Margaret spent two years as a Peace Corps Volunteer in Colombia, South America from 1973 to 1975, and remains involved with the returned Peace Corps volunteer community. She has been involved with OLLI at Duke as a board member, instructor and volunteer. Currently she is an avid filmgoer and active in several card groups (bridge, euchre, hand & foot).



For Treasurer: Joe Liegl

Joe hails from Wisconsin. His undergraduate and law degrees are from the University of Wisconsin-Madison. Joe has worked at the US Department of Justice in Washington DC for four years, where he began his career as a tax lawyer.

Joe has worked at the Cleveland office of a major law firm (Jones Day), and the Detroit office of a major accounting firm (Coopers & Lybrand). Since retiring, Joe has been treasurer for three non-profits in the Chapel Hill area, as well as being treasurer for NorCCRA for the last year. Joe also spent over six years on the board of the Inter-Faith Council for Social Service (IFC), which has long served the food insecure and those experiencing homelessness in the Chapel Hill area.

Joe served as the secretary, treasurer, vice president, president, and immediate past president on the IFC board. Joe has been on the bylaws committee of the residents association at Carolina Meadows, and is now on the building, grounds and safety advisory committee. He is also the representative of his precinct at Carolina Meadows, and was secretary of the precinct last year.

Your NorCCRA Officers:

These individuals are the 'front office' of NorCCRA for 2022.



**President:
John Olmstead**



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



**Secretary:
Caroline Filbert**



**Treasurer:
Joe Liegl**

2021-2022 NorCCRA OFFICERS

President: John Olmstead
Scotia Village - olmsteaj@erols.com
Vic President: Charles (Skip) Kingan
Croasdale Village - skingan47@gmail.com
Secretary: Caroline Filbert
SearStone - cfilbert12@aol.com
Treasurer: Joe Liegl
Carolina Meadows -

Members of the Executive Committee

Clint Willis, Past President
Scotia Village, - bg.clint7@gmail.com
Bob Osborn, Western Region Leader
The Pines at Davidson
rho.cincy.60@gmail.com
David Teal, Central Region Leader
Well Spring, - tealdavid@gmail.com
Margaret Keller & Carol McFadyen
Eastern Region co-Leaders
The Forest at Duke
kellerpair@aol.com
carolmcf@nc.rr.com
Dick Newbold, Presidential Appointee
Scotia Village, newboldra@outlook.com
Sindy Barker, Legislative Affairs
Carol Woods, - sindydevoebarker@gmail.com
Susan Rhyne, Membership Director
Twin Lakes, - morhyne@bellsouth.net
Margaret Zircher, Presidential Appointee
Multi-State Continuing Care Resident Association
Leadership Group
zircher@me.com
Virgil Torbert,
Ad-Hoc Recruiting Committee Chair
vmtorbert@gmail.com
Jamie King, Hotline Editor/Publisher
Trinity Oaks, - kj4jk@arrl.net

The Pines Plans A Pollinators' Paradise

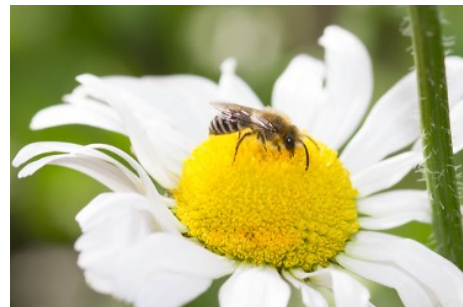
Every retirement community wants to be warm and welcoming, but to wasps? Bats? Ladybugs? Geckos? At The Pines in Davidson, all of these critters are invited to the newly designed pollinator garden.

Bees and butterflies are the best known pollinators, but there are plenty of others that collect pollen and pass it around, nourishing the landscape and assuring that plants and flowers keep growing and blooming.

The plan for a pollinator garden followed the creation of a fenced garden where residents can fill 34 plots with vegetables or flowers. (Our previous garden was lost in a recent expansion) There was empty space nearby, and it soon will be a pollinating paradise filled with familiar and never-heard-of-'em flowers. We all know sunflowers, hydrangea, peonies and honeysuckle. But have you ever met a Cooper's Ice? A Jacob Cline? How about a Pussy Toe? There are dozens of different plants and flowers in the garden plan – and even some herbs. Mint is popular with hummingbirds, and bees and butterflies are partial to thyme.

The Pollinator Paradise will take about a year to settle in. It will have water and bird feeders and plenty of places to stroll and sit. We'll just be careful not to interfere with the banquet!

Jane Shoemaker, The Phones at Davidson



“Teach Us Something”:

How We Created “Senior Seminars” in Our CCRC

Long after graduating from school and well into old age, people hunger to keep on learning in the company of others. The residents of Carol Woods, a Chapel Hill retirement center, vividly demonstrated that need during the Covid quarantine in 2020. I was chatting with eight other newcomers at six-foot distance under a tent. “Teach us something,” they pleaded with me, a retired history professor. During the next two years, my fifteen-minute impromptu class about the 1932 election gave birth to an ongoing series of twice-yearly “Senior Seminars.”

Residents volunteer to teach fifteen fellow-residents on diverse topics. The total thus far: 21 instructors, 322 students, 26 topics ranging from “School Choice” to “Russian History through Literature” to “Rural America” to “DNA.” Unlike OLLI classes, ours is a free, grassroots curriculum by and for the residents.

Peter Filene, Carol Woods

What is NorCCRA?

The North Carolina Continuing Care Residents Association is a statewide nonprofit volunteer organization of residents living in the 60+ continuing care and life care retirement communities in the State of North Carolina. Current membership numbers over 4,700 individuals.

Interested in Working Inside NorCCRA?

In your former life were you a librarian, accountant, actuarial, engineer, office manager, administrative assistant and you would like to volunteer to assist our executive staff on special and/or ongoing projects, please send an Email with your name and a brief summary of what you'd like to do in the NorCCRA scope of operations, along with a summary of your experience, to skingan47@gmail.com, or contact your NorCCRA Community Representative.

MEMBERSHIP NUMBERS MATTER - RECRUIT A FRIEND

The current session of the NC State Legislature is especially important to you, because this is the year that there will be or won't be a sales tax exemption for your monthly CCRC fee. It's going to be decision time on that issue in Raleigh during this year's legislative session. 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. As your NorCCRA representatives work in the Legislature this Fall and Winter, the numbers of members that they represent will carry a LOT of weight!



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.