



The Hotline

North Carolina Continuing Care Residents Association

www.norccra.org

NorCCRA Eastern Regional Meeting at Carolina Meadows Wednesday, April 10th

Carolina Meadows is delighted to host the annual meeting of the Eastern Region of NorCCRA on April 10, 2024. We have planned a program that should be informative as well as enjoyable.



Our first speaker is Kevin McLeod, President/CEO of Carolina Meadows Senior Communities & Services, Inc. which is the parent corporation of Carolina Meadows, Inc. Kevin has a long time involvement in the vision, management, and operation of CCRC's including 25 years at Carolina Meadows – 7 years as CFO and 18 as CEO. He will be giving a history of the development of CCRC's with an emphasis on North Carolina. The presentation has been very popular and should provide a great start to our NorCCRA meeting.

Our next presentation will be from UNC-CH Public Policy students who will present a CCRC Sustainability Report. The students were involved in identifying, surveying and interviewing management and resident leaders in CCRCs engaged in sustainability initiatives. This was the students' fall semester capstone project. They managed to collect data from 53 CCRCs in North Carolina and across the country. In addition, they conducted in-depth interviews at selected CCRCs. Specific areas of focus were solarization, use of electric vehicles, composting, and water conservation. The students will share the recommendations resulting from their study.



The NorCCRA Eastern Regional Meeting will follow lunch with NorCCRA President Charles (Skip) Kingan presenting a NorCCRA update and with Legislative Committee Co-Chair Sindy Barker, a legislative update.

To end the day, there will be 30 minute breakout sessions to choose from:

- 1) Residents of Carolina Meadows - highlights from their very popular resident written, scored, and directed musical 'Movin'
- 2) The resident/staff committee on Positive Endings
- 3) The resident/staff committee on Diversity, Equity, and Inclusion.
- 4) Bus tour of the Carolina Meadows Campus

Look for Registration Form on Page 8



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President's Message.....from Skip

Governance

Many of you have seen the recent articles published in the Charlotte Ledger, Business NC and others regarding the continuing financial crisis at Aldersgate retirement community in Charlotte, NC. In August of last year, NC Department of Insurance (NCDI) placed Aldersgate under a "150 day Order of Supervision" which expired in early January 2024. The department immediately filed a second "150 day Order of Supervision".



The information about Aldersgate is not the upbeat items I prefer to bring to your attention, but it brings to the forefront an important point that needs to be understood by all of us. For those of us residing in non-profit CCRCs, the board of trustees is primarily made up of unpaid volunteers. However, as the holder of the license issued by the DOI, the Board of Trustees have the responsibility to all the residents to ensure that all activities of management are in the best interest of residents and the community, both fiscally and otherwise. Proper oversight is needed and cannot be relegated to a consultant or management.

What we can do as residents: 1) be active in your communities, volunteer for committees and residents associations 2) officially request through your resident associations that Board members attend the semiannual Department of Insurance required meetings 3) request your Board of Trustees to include more voting resident members.

NorCCRA will be requesting both NCDI and Leading Age to join with us to strengthen Governance policies within our communities.

January Executive Committee Meeting:

The Executive Committee meeting in January was devoted to updates and conversations with the North Carolina Department of Insurance (NCDI), in particular, the Special Entities Section. This is the section responsible for oversight and regulation of CCRCs. We met with Jeff Trendel, the Deputy Commissioner of the Financial Analysis & Receivership Division; Nancy Wise, Manager, Special Entities Section and Shauna Schwartzel, CCRC Analyst, Special Entities Section.

Notes from NCDI: There are CCRC expansions of \$1.1 Billion, adding an additional 1,253 independent living units, 145 assisted living units and 31 additional nursing beds. Ziegler Investment Banking reported median monthly fees were up 6% compared to 4.48% last year and 3% in the previous years.

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Presidents Message continued from Page 2:

One of the questions asked by NorCCRA was: what does NCDOI see as the big issues in overseeing CCRCs in North Carolina? DOI responded that there were many: complexity of legal structures, debt, occupancy ratios, market over saturation, regulating continuing care services without lodging, size of disclosure statement versus providing needed disclosures. The final issues on their list are at the top of mine:

- **How do we get residents and prospective residents to read and understand the disclosure statement?**
- **Do they understand their rights and the risks inherent in CCRCs?**
- **How do we get prospective residents to read and understand their resident contract before signing?**

The full DOI presentation is available. Just send me an email (skingan47@gmail.com) requesting it. Be sure and let me know if you are a Mac or Microsoft user.



*Legislative Update
from **Sindy**
and **Martha***



We expect the General Assembly to reconvene in May. With the successful passage of the sales tax exemption in the 2023-2024 budget, we will focus in the short session on the revision of the CCRC statute in **S145, Continuing Care Retirement Communities**.

After amendments in the Senate Commerce, Insurance, Judiciary, and Finance committees, the Senate passed **S145** on June 28 and sent it to the House where it remains in the Rules committee. Representative Mitchell Setzer, District 89 (Catawba and Iredell), and Representative Chris Humphrey, District 12 (Greene, Jones, Lenoir), co-sponsored the companion bill **H170**. They co-chair the House Insurance Committee and will shepherd **S145** through the House. Our lobbyist Cassidy Whitley stays in touch with these two House members.

We expect the Insurance Committee to consider the bill early in the short session. Once it passes, it will likely go to the House Health Committee and then to the full House. With no further amendments and House approval, **S145** becomes law. If there are additional amendments, it will return to the Senate for agreement.



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Harvesting the Gifts of Aging a 5-hour workshop on finding those special gifts

Nearly 50 residents of Pennybyrn spent an enjoyable and educational 5 hours together on October 13, 2023, exploring the special gifts that can be found during this special time of our lives. This insightful event was led by Dennis Stamper, a friend and former colleague of several Pennybyrn residents, who resides in the Morganton, NC area. A licensed Clinical Social Worker and Commissioned Pastor (who worked the last 20 years of his career as a hospital chaplain), Dennis spends part of his retirement as a retreat guide with The Center for Conscious Eldering. He is also a certified Sage-ing Leader with Sage-ing International. He's passionate about "Conscious Eldering" and organizes workshops and retreats on the topic around the country and on-line.



How did Dennis keep us engaged, excited, and (mostly) seated for that length of time? He had us mesmerized within the first few minutes. He started the workshop

with his insights on aging, interspersed with poetry dealing with getting older. Through guided discussions and both individual and group reflections, we explored six gifts of aging. We were inspired to think, share, laugh, and bond. We were invited to think what traits of being an "elder" (yes, we've earned that title!) we would like to nurture in ourselves. We also explored growing deeper as we grow older, harvesting the gift of a life lived long, the gift of letting go of that which no longer serves us, living a life no longer confined by fear, and intentionally creating our legacy.



We laughed, cried, shared, and when the workshop concluded, Dennis left us with one final gift: strumming his guitar, he sang a song he wrote about aging, leaving us with this last, personal thought: "I just want to see the rest of the show," he sang. Don't we all?



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Solar Panels Come to Salemtowne

by Sarah Catron

Several years ago, late resident Bob Giegengack eloquently and forcefully outlined the economic and ethical merits of solar energy for Salemtowne in an article entitled, “Can Salemtowne Go Solar?”

Spurred by Bob’s passion, the Environmental Sustainability Committee of residents led by Tom Mann added Solar Energy to its list of concerns. Having already supported energy conservation and recycling efforts, the move to “go solar” seemed a logical step.

Residents first established the Sustainable Energy Fund for clean energy initiatives. After months of study, consultation with solar energy providers, and a feasibility evaluation, the Solar Panel Project was launched with a goal of raising \$200,000 to install 230 solar panels on the Babcock Health Care Center roof.

Several major factors gave energy and assurance of the program’s success.

1. Many residents generously gave time and money.
2. A resident donated \$50,000 as matching funds.
3. Vice President of Development Emily Rector provided valuable guidance and expertise.
4. Duke Energy rebates and the Federal Inflation Reduction Act provided financing assistance.
5. The Moravian Ministries Foundation and the Winston- Salem Foundation provided grants.

Now, a year later, Salemtowne residents look with pride and proclaim, “We did it!” Besides costing Salemtowne nothing after rebates, this resident-led initiative will add significant financial savings. And the panels will just lie on the roof, doing what they are designed to do — ensure cleaner air, lower energy costs, and reduce the harmful climate effects from burning fossil fuels.



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Sleeping Mats from Glenaire Keep Rolling!

What started last spring as a short-term project building up to Wellness Week at the end of April, has evolved into an ongoing project making sleeping mats for unhoused veterans through Military Missions In Action (MMIA) whose home base is in Fuquay Varina. MMIA, founded in 2008, is dedicated to assisting Veterans in need, current members of all Armed Forces, and their loving, supporting families.

So far, the Glenaire group has produced 23 sleeping mats, with 6 being picked up on September 13. The mats are about 6 feet long by 2 ½ feet wide and are made from plastic grocery bags. It takes about 400 – 600 bags to make one mat!! They are lightweight, water resistant, easily cleaned, do not attract ticks or fleas, and do not transmit heat or cold from surfaces they are placed on. When folded in half and rolled up, they are easily carried.

Veteran Affairs groups across the state hold *standdown* gatherings in their counties, many of them taking place in the Fall, offering various supplies, such as socks, toiletries, blankets, etc., flu shots, dental care, help with VA benefits, making résumés, and learning about available resources.

There is a wonderful, 22-minute YouTube video called *How To Make a PLARN Bed Roll* that shows the entire project from beginning to end.

Producing the mats costs nothing but time, which is admittedly significant since the crocheting alone can take 8 hours or more, but once you're in the groove you can watch TV, carry on conversations or whatever. One doesn't have to do the whole job from beginning to end. One woman at Glenaire who loves taking part is 92-years-old and visually impaired. Still, she can make the plastic circles into plarn and it makes her feel that she is making some small difference in the world.



We can all make a difference if we put our minds to it! Photo is Debi Moccock, a volunteer from MMIA, picking up mats from Sally Fox at Glenaire



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Your Officers & Staff for 2024-2025



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**Please Register me(us) for the Eastern Region
Annual Meeting April 10th at Carolina Meadows
Registration begins at 9:00 & Meeting Starts at 9:30**

Name(s) Please Print _____

CCRC Community: _____

Email: _____ Phone Number: _____

I (we) have the following dietary restrictions: _____

Number of registrants: _____

Cost for registration and lunch is \$20 per person.

Mail this form and a check made payable to NorCCRA to: Margaret Zircher,
330 Carolina Meadows Villa, Chapel Hill, NC 27517

Reservations must be made by March 26, 2024

Application for membership in North Carolina Continuing Care Residents Association

Name: _____ Community: _____

Spouse's name (if applicable): _____

Address: _____

Email address: _____ Phone number: _____

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 representative, otherwise mail to Susan Rhyne, 3913 Muhlenberg Court, Burlington, NC 27215 **Thank You.**

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