

NaCCRA LIFELINE

*The Resident's Watchdog...
The Industry's Friend*

National Continuing Care Residents Association

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President's Report



Dear NaCCRA Members,

There is a measure of excitement building up over the Annual April 9, 2011 Meeting of NaCCRA to be hosted by Asbury Methodist CCRC in Gaithersburg, MD. This will result in a report of Bill Root's special committee

looking into the long term implications of Life Time Care. The committee is holding regular meetings re Conference Calls with very good participation plus the wise counsel of our Actuary Consultant, Jack

Cumming of Carlsbad By The Sea in California.

Also on April 9 we will be welcoming the new President of NaCCRA, Ruth Walsh, who brings on board a wealth of experience having coordinated the CCRCs in Connecticut and bringing with her numerous NaCCRA members throughout her home state.

Those members traveling from outside the greater DC area will be able to capitalize on the convening of the AAHSA House of Delegates Meeting on April 11 in DC.

I look forward to continuing as a former President of NaCCRA in advancing the causes of this significant and only national organization of residents of CCRCs.

John T. Mathison, President

NaCCRA Officers . . .

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Check out our website at: www.NaCCRA.com

*See page 7 for information and
registration form for Annual Meeting
April 9, 2011! We hope to see you there!*

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Editorial



It's been a banner year for your national CCRC residents association. Our membership is growing far and wide and new initiatives are on the drawing board that point to another banner year ahead. We are very grateful for the increasing number of our members who are submitting interesting articles and resident news, as well as for the increased number of financial contributions to our cause.

We are particularly pleased to be able to highlight residents' creativity in this issue. Of special interest you will find celebrations of notable milestones in the history of some of our members and their CCRCs. Also in this issue you will discover outstanding samples of resident art and writing. The two survey reports from the Organization of Residents Associations of New Jersey (ORANJ) will be helpful to many of our readers and I commend them to you. We've made room for a bit more of lighter reading and more illustrations as well. We look forward to reporting on the Massachusetts initiatives regarding Residents Bill of Rights in our upcoming issues.

Your officers and board members send all best wishes for a happy, healthy and otherwise great year for all our members, their friends, neighbors and colleagues.

Marleen A. Varner, Editor

Letters to the Editor:

Dear Mr. Mathison and Ms. Varner,

I have just read the November/December issue of NaCCRA *Lifeline*. Many thanks to both of you for giving so much of your time for the benefit of all CCRC residents.

However, I disagree with Mr. Mathison's suggestion that NaCCRA become involved in the question of handguns. The article states "NaCCRA has been invited to join the nationwide concern related to Hand Gun Control". Invited by who, and how did you respond?

Hand guns are but one of hundreds of issues confronting our country. There is no reason for the organization to be involved in any legislation, which does not directly affect the core mission, which "exists for the purpose of promoting, supporting and protecting the chosen lifestyle of CCRC residents in the United States...and is dedicated to the promotion of CCRC communities as a humane, cost-effective, long-term model for elderly individuals."

I hope you will reconsider your suggestion and withdraw your proposal to have NaCCRA take part in handgun legislation, or any other legislation not directly involved in the core mission.

Thank you for your consideration.

*Jane Romeyn
Indian River Estates West CCRC
7742 Willow Wood Lane
Vero Beach, Florida 32966*

January/February 2011

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NaCCRA exists for the purpose of promoting, supporting and protecting the chosen lifestyle of Continuing Care Retirement Community (CCRC) residents in the United States. NaCCRA is the only national organization for CCRC residents and is dedicated to the promotion of continuing care resident communities as a humane, cost-effective, long-term care model for elderly individuals. Its work is conducted solely by volunteers and support comes from dues and gifts.

The Association since October 2000 has been classified by the IRS as a tax exempt 501(c)(3) Corporation. Donors may deduct contributions as provided in section 170 for Federal estate and gift tax purpose if they meet the applicable provisions of sections 2055, 2106 and 2522 of the Code.

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Wyndemere Senior Living, Wheaton (IL)

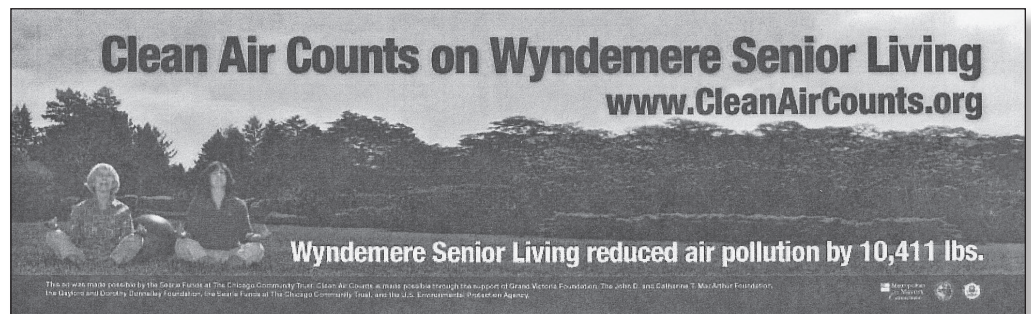
First Retirement Community in US to earn Earth Flag for Recycling Efforts

In 2003, a small group of about 10 residents at Wyndemere Senior Living Campus became a team with the goal of promoting, educating, and encouraging all residents to recycle appropriate waste items. The staff of Facilities and Environmental Services provided enthusiastic support for this project.

The campus has 12 trash/recycle rooms. Initially, each housed two containers, one for trash and one for paper. Later, two more containers were added: one for glass, cans, and recyclable plastics (not #6, and one for additional items that didn't fit into any of the other three categories. (Signs posted in each of the trash/recycle rooms specify which kinds of items are to be put in each bin.) All items are taken to the "Wyndemere Center for Recycling", a designated area in the underground garage, where they are sorted and distributed to their appropriate locations:

- Aluminum, tinfoil, soft drink cans are crushed and sold.
- Household batteries and aerosol cans go to a waste collection center.
- Vases, baskets, and pots in good condition are sent to a local greenhouse or flower shop for reuse.
- The bus driver delivers plastic bags to grocery stores when he takes residents on regular shopping trips.
- Most shoes are taken to the Peoples Resource Center. Athletic shoes provide the base for running tracks.
- Eyeglasses are delivered to eye clinics for recycling.
- Labels and pop-tops are turned in to local schools where they can be redeemed to purchase equipment.
- Molded Styrofoam and filler material ("popcorn") go to places like UPS or Mail 'n Stuff for reuse.
- DuPage County hosts an extravaganza twice a year in which electronics, books and many others are for sale.

The School and Community for assistance for Recycling and Composting Education (SCARCE) was consulted and made a presentation to staff and residents and provided assistance in completing a waste audit before this project got underway. At Wyndemere there is justifiable pride in the fact that after two or three years, Wyndemere became the first retirement community in the country to earn an Earth Flag. Representatives from Wyndemere were invited to make a



presentation at Life Services Network (LSN) during a session on "Best Practices" held at Navy Pier in Chicago. Several outsiders have requested information about this program and made on-site visits.

Arbor Day is commemorated by conducting a ceremony and planting a tree or shrub every year. Together with Clean Air Counts (an initiative in Northeast Illinois to reduce ozone-causing emissions, a collaborative effort between Metropolitan Mayors Caucus, Chicago, the US EPA Region 5 and Illinois EPA), Wyndemere folks planted a Native Plant Demonstration Garden on campus and have participated in the spring Prairie Path Cleanup project.

On campus, the committee is currently working with the dining staff to eliminate use of Styrofoam cups and encourage use of glassware instead of plastic at special events. Residents are supportive and complimentary of the committee's efforts and strive to cooperate to the best of their understanding. A key strategy in program development is orienting both new residents and staff to this program.

The committee meets on a monthly basis, and a periodic newsletter is given to all residents. The committee has hosted lobby displays of various items with labels indicating which contained would be appropriate for each. Committee members have gone on field trips to a recycling center and to the Chicago Cen-

continued on page 4

Wyndemere Senior Living *continued from page 3*

ter for Green Technology, as well as printing a flyer listing many items under the heading “What In The World Should I Do With This?”.

Another committee activity has been reporting to Clear Air Counts the emission reduction strategies and analyzed the low volatile organic compounds (VOC) in paints and carpets on the campus. This led to recognition of these efforts being printed in their newsletter as well as on a billboard that displayed a picture of committee organizer and NaCCRA mem-

ber Joanne East and Penny Schneider, Facility Services Manager. Also noted on that billboard was the number of pounds of reduced emissions that had occurred as a result of those efforts.

Last year, after reading the *Handbook on Conservation for Retirement Communities* from Gray is Green; the name of the Wyndemere Recycling Committee was changed to the Wyndemere Conservation Committee.

Wyndemere Resident Honored as Wheaton, Illinois, Good Citizen of the Year



One person can truly make a difference...and NaCCRA member Joanne East has done just that. She has been recognized by the City of Wheaton (IL) as an outstanding citizen for her efforts in recycling and volunteerism. “Joanne is relentless in her efforts as a volunteer at Wyndemere and is a true icon in

the community,” said Gina Worch, Wyndemere’s Program Director, who submitted her nomination for the award.

Joanne founded the Recycling Committee that earned Wyndemere the Earth Day Flag from the School and Community Assistance for Recycling and Composting Education (SCARCE) organization for their commitment to recycling and environmental issues. Her efforts to work with the Campus by

planting native plants and switching to environmentally friendly cleaners have saved more than 450 pounds of air pollution and also earned the Campus a plaque from Clean Air Counts, A Northwest Illinois regional initiative to reduce ozone-causing emissions.

“I really believe in grass roots efforts,” said Joanne. “I’m just trying to do my part. I’m very humbled by this recognition.” Joanne’s volunteer efforts touch residents and staff on a more personal level as well. She formed a Caregiver Support Group on the Campus that meets monthly to help other residents whose family members are dealing with Alzheimer’s disease. As a former speech therapist and learning disabilities teacher, Joanne also began teaching English as a second language to about 10 Wyndemere staff members.

“Joanne’s love for life, for learning and for teaching are amazing,” said Gina. “She truly IS a Good Citizen for the Year.”

From *Winning Ways*, the newsletter for Wyndemere, Westbridge and Wynscape

Notable February Dates and Celebrations

February 1 – Freedom Day
 February 2 – Groundhog Day
 February 3 – Chinese New Year
 February 6 – Super Bowl XLV
 February 9 – National Stop Bullying Day
 February 11 – National Shut-in Visitation Day
 February 12 – Lincoln’s Birthday

February 13 – Grammy Awards Day
 February 20 – World Day for Social Justice
 February 21 – Presidents Day
 February 22 – George Washington’s Birthday
 February 27 – Academy Awards Night
 February 28 – Purim

Your Voice Through Membership



Residents in Continuing Care Communities need a voice. Who speaks for you in your community? There are many organizations that advocate for the elderly. As an Advocacy Coordinator for AARP, I have advocated for many issues that involve the elderly, but not specifically for residents in CCRCs. To my knowledge there is only one association that does, the National Continuing Care Residents Association [NaCCRA]. This is the reason for my involvement with this association.

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This Association needs additional members. Membership is directly linked to how effective we can be. In seeking additional members we are relying on you, to spread the word in your community about NaCCRA . It would be wonderful if we had an unlimited budget that would allow your leadership team to visit each and every continuing care community in each state. We do not have those finances. Our reliance on membership rests with you, our dedicated members. The membership figures show that our members and some state associations are doing a terrific job of recruiting new members. To be an effective organization we must do better.

What impresses me most is that NaCCRA provides a medium for communities and residents throughout the nation to network with each other. NaCCRA provides a medium for residents and communities to share ideas and concerns.

An increased membership in NaCCRA would give residents in Continuing Care Communities a greater voice in the management of their community. *LifeLine*, our great publication, also provides a medium for members to share concerns and achievements.

REMEMBER:

NaCCRA is dedicated to the residents. NaCCRA through the publication *LifeLine* keeps you informed. NaCCRA is affiliated with AAHSA. NaCCRA provides members with a forum for the exchange of ideas.

Come and join us in this crusade for membership. The cost is reasonable. The application is in our publication *LifeLine*. Each additional member that you recruit strengthens our association. Every member that renews his or her membership aids us in our mission.

Thank you for all that you do.

*Len Sikora
Vice President Membership*

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Some Good Tips for Pet Owners

If you're a cat or dog owner or if you know somebody who is, please plan now for care of your pet if there is an accident. Consider doing any and/or all of the following:

- Choose a caregiver that your dog or cat knows. Make sure that the person knows how to get into your house or apartment, and that he or she knows how to take care of your animal.
- Make sure the caregiver's contact information is in your wallet so that you can give it to emergency personnel if you are involved in an accident. Or that somebody else could find it if you're not capable of providing it.
- Leave instructions for the caregiver. Provide information that includes your pet's feeding and walking schedule, your vet's phone number and the location of the animal's medical records, food, leash and other items.

- Approve treatment in advance and sign a statement for the vet that allows him or her to treat your pet if needed.
- Post a rescue sticker on your window or door, telling fire fighters and other personnel that a dog or cat is in the home.
- SOURCE: Based on a short item in BOTTOMLINE PERSONAL, Volume 31 Number 22, 11/15/2010, p. 15.
- ONE MORE SUGGESTION: When you do your will, make sure you have made arrangements for the care of your pets. You don't want to see them go to a shelter; e.g., if nobody else is willing to step up to care for them.

Adapted from Blainesworld #743, an e-mail newsletter in Asheville NC.



Letters to the Editor: *continued from page 2*

ED: Thanks for your continued faithful reading and letting us hear from you. Other members have expressed similar thoughts on our need to focus on issues directly related to our stated mission. Others have expressed support for the topic, but not necessarily as a project for NaCCRA.

Dear Editor,

As 2010 draws to a close, I look back on my activities and realize that I've been extremely fortunate to have had the opportunity to serve the residents of Florida as their president and provide limited service to the national residents as their appointed executive director. In these positions of honor, I've spoken with many residents in both formal and informal settings, as well as corresponding via email. The general trend of all questions from residents everywhere is: "When do you think the housing situation will correct itself and when will to economic downturn be over"? Unfortunately, no one has a good answer to these questions. All we can do is point out indicators that indicate that maybe things are getting better. One encouraging trend is that most residents are tired of the "blame game" and want to see solutions and not finger pointing. I sure hope this trend will continue among residents and move into the elected ranks as well.

Another frequent question is: "When will we have residents as equal members of all governance boards"? I think this question is driven by the bankruptcy of the CCRC in Pittsburg, PA and one of their residents testifying before the Senate Committee on Aging and stating in his opinion this would not have happened if there had been residents on their governance board. With more individuals from the Silent and Baby Bummer generations entering CCRCs, the demand for board representation will increase. I think it will be prudent for all management and boards to recognize this trend and appoint residents as board members before states or the national legislators mandate their addition.

In Florida, the two main concerns have been "CCRCs Without Walls" and the Ombudsman program. Some residents see CCRCs Without Walls as a big assistance to management during these trying times and some see this model as a threat to their chosen lifestyle. The Florida Life Care Residents Asso-

ciation (FLiCRA) has joined providers and the Office of Insurance Regulations on a task force to develop a new regulation to govern this change to CCRCs. Hopefully our new model will provide a solution that will serve more residents without hurting the existing lifestyle. The other major concern was for an ombudsman program individuals trained in independent living issues FLiCRA is still working on a salutation for this issue.

This is a quick summary of concerns of residents living in CCRCs. Extensive articles could be written about each concern but I think a summary is sufficient at this time. The vast majority of all residents are extremely happy with their situations and life in a CCRC. In all communities that I have visited, the residents believe they live in the best CCRC in the country and I agree with them. I have visited over 100 communities and found each one to be unique and special in its own right. I could be happy living in any of them.

I love the *LifeLine* and know that you work hard to provide all residents with excellent information.

Charlie

Charles D. Paulk,
Executive Director NaCCRA & President FLiCRA
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Dear Editor:

Kudos should be given to LTC Lucy Bond. Her diligent reminders and information regarding the work of NaCCRA can be credited for the 16 recent members of Knollwood Retirement Community for military officers and their spouses built and acquired by Army Officers Wives organizations raising the money. She brings membership applications to the monthly resident meetings! I thought you should know this.
Eunice B. Brownley

ED: Thanks to one of our newest LIFE members for sharing this very important membership recruitment message!

**NATIONAL CONTINUING CARE RESIDENTS ASSOCIATION
NaCCRA ANNUAL MEETING AT ASBURY METHODIST VILLAGE, GAITHERSBURG, MD
SATURDAY APRIL 9, 2011**

AGENDA

9:30 AM	Registration	
10:00 AM	Call to Order	Ruth H. Walsh, NaCCRA President-Elect
	Welcome	Executive Director, Asbury Methodist Village
	Host Introduction	Bob and Mary Anstead
	Minutes of the October 31, 2010	Lynn Dizard, Secretary
	Treasurer's Report	Joseph H. Walton
	Report of AAHSA Meeting Oct/Nov.	Marleen Varner, NaCCRA Vice President
	Review of 2010-2011	Charles D. Paulk, NaCCRA Executive Director
	Public Relations and Publicity	Marleen Varner, Editor of <i>LifeLine</i>
	Legislative Report	Julia Hix, NaCCRA Vice President
	Membership Report	Len Sikora, NaCCRA Vice President
12:00 Noon	Lunch (Board of Directors Meeting Concurrently)	
1:15 PM	The National Senior Conservation Corps	Kath Schomaker, Outreach Manager
2:00 PM	Ad Hoc Committee of NaCCRA (Studying Various NaCCRA Finances)	William A. Root, Chair, Committee Members: Chriss, Lou Evans, Gerard Hyland, Sam Keiter, Bob Negele, Charles Paulk, Mary Beth Tompane, Barbara Trezona, Joseph Walton, Actuarial Consultant: Jack Cumming
3:30 PM	Reports From State Associations:	
	California: Walt Rozett	New Jersey: Dan Hartley
	Connecticut: Ruth H. Walsh	North Carolina: B.Gen. Clinton V. Willis, Jr.
	Florida: Charles D. Paulk	Pennsylvania: George Tjiattas
	Maryland: William A. Root	Virginia: Lou Evans
	Massachusetts: Robert Naka	
4:00 PM	Community Association Reports	
4:30 PM	Nominating Committee Report	Beth High, NaCCRA Chair Person
4:45 PM	Unfinished Business	President Ruth H. Walsh
5:00 PM	Social Hour	
6:00 PM	Dinner	
7:15 PM	AAHSA's National View	
	Stephen J. Maag, Leading Age (AAHSA) Director of Assisted Living and Continuing Care	
7:40 PM	Questions and Answers	
8:00 to 9:30 PM	Regional and State Gathering of NaCCRA Members	
9:30 PM	Adjourn until October 2011 in the greater Washington DC vicinity (TBA)	

NaCCRA ANNUAL MEETING REGISTRATION FORM Asbury Methodist Village
Full Registration Lunch and Dinner \$30 per person (Include Checks made out to NaCCRA)

Name(s): _____ Apt. _____
 Street: _____ City: _____ State: _____ Zip Code _____
 Phone: _____ E-Mail: _____
 Community: _____

Make out checks to NaCCRA and mail to Bob and Mary Anstead, 419 Russell Avenue, Gaithersburg, MD 20877

Suggested Accommodations: Asbury Methodist has 3 double guest rooms and 1 single

Comfort Inn, Shady Grove \$79 to \$169, Holiday Inn Gaithersburg, \$89 to \$229

Hilton Washington DC-North Gaithersburg, \$99 to \$259

Hyatt Summerfield Suites, \$99 to \$259 (10 reservations required for Group Rates at all hotels)

MAKE RESERVATIONS WELL IN ADVANCE FOR THE BEST RATES

CELEBRATIONS AND MEMORIES

Writings and ramblings of residents

A New Year's Toast/Blessing for 2011

With friends gathered around us, the heartbeat of hope
dwelling within us and the new year before us

Grant us:

Grateful hearts for the community of which we are a part
Open and growing minds to invigorate our days
Hands outstretched in care for others
Food and drink to nourish our bodies and gladden our hearts
Energy to be good neighbors in our surrounding Community

On the threshold of the new year:

grant each one a full measure of joy and satisfaction
as new experiences of community are discovered
and
new ties of friendship developed.

Bob Nicholson, Mirabella (WA)



Oh, Pioneers

October 28, 2000, Ingleside at Rock Creek (DC)

Actuarially,
We
Should not be.

Marketing will agree.

Sad for the economy
At Ingleside, The T.L.C.
May make us live eternally.

Sorreee!
Sarah Yerkes

Our thanks to Page Hawk for sharing this one!

Ode to Fleet Landing

By Marion Boyd

Tune "Side by Side"

Twenty years of Fleet Landing! It's Another Beautiful Day
For walkin' around or doin' the town in that wonderful
Florida Way.

Now we're having a party. We're gonn'a celebrate!
Twenty years have come and gone beside our lovely lake.

Say-ay, aren't you glad that you're livin'
in our little corner of heaven?

No worries, no woe. We never see snow on our First Coast.

The chef does all of the cookin'!

The servers all are good lookin'!"

Roger pays all the bills! Doc Cantrell tends our ills!

Here's a toast!

We roll along together, with a hurricane now and then.

Josh, our gallant leader,

(even tho' we'd swear he's of the class of two thousand ten!)

We all know that we're lucky.

We left Virginia, New York or Kentucky

To settle at Fleet. We can't be beat. Side by Side.

We've all been to Tahiti, London, Paris and Rome,

The Great Wall of China! Nuthin' could be fin-ah,

But Fleet Landing is home!

And now we're raisin' our glasses,

to a place that nuthin' surpasses.

We're all of one voice! We had a great choice!

We're up at the top! We're cream of the crop!

North, east, south or west! Fleet Landing's the BEST!

Side by Side!

This was sung at the anniversary celebration and tribute of
20 years of community 1990-2010 held at Fleet Landing's
(FL) Windward Hall on November 18, 2010.

Reprinted by permission from the December 2010 issue of
"Fleet Beat". Special thanks to Enith Vardaman who also
serves on the *LifeLine* Advisory Committee

ART COLLECTION DISPLAYED AT INGLESIDE

A unique and eclectic art collection has found a home at Ingleside at Rock Creek (IRC) in Washington DC. After nearly a year of planning, some 250 pieces of art are displayed in the public areas on all three floors of the Ingleside Suites (assisted living), as well as on the two floors in the Health Center (nursing care). The Women’s Board* which sponsored this ambitious project did so because they didn’t want the usual “catalogue art” on the walls. “We wanted the hallways to have a feeling of intimacy. After all, this is the residents’ home,” said Jennie Leitch, president of the Women’s Board.

Several of the works were done by Ingleside residents who worked professionally in the arts. Many



Ingleside Resident Photographer and Resident Association President Jane Angus



Woman’s Board member Kitty Mathais-Riegel with artist/Ingleside resident, Kitty Crabster


residents donated art work that they had collected from their world travels—from Europe to Asia. The collection includes signed art from numerous Washington area artists, as well as artists in California, Kansas, New York, North Carolina, Washington State, and West Virginia. Several outstanding works were provided by the Women’s Board Opportunity Shop.

The styles of art range from traditional to abstract, with a wide assortment of medium—oils, acrylics, watercolors, collages and photographs. The Women’s Board also published a 24-page guide describing the art on each floor, a handy reference for residents and visitors to use at their leisure. The guide includes bios on many of the artists.

“We don’t expect everyone to like everything they see,” says Barbara Mathias-Riegel, the chairperson of the art project. “That is the mystery and energy behind art: Whether a painting, drawing or photograph, it speaks differently to each of us.”

*The Women’s Board, formerly known as The Board of Lady Managers, has played an active role in the Life of Ingleside at Rock Creek since its founding in 1906 as the Presbyterian Home of the District of Columbia. The Board is composed of volunteers from Presbyterian congregations in the National Capital area.

By Barbara Riegel, Curator



Senior citizens are the nation’s leading carriers of AIDS

Hearing Aids	Walking Aids	Rolaids
Band Aids	Medical Aids	And most of all, monetary aid to their kids!



Highlights of Resident Board Member Study

In the spring of 2010, the Organization of Residents Associations of New Jersey (ORANJ) sponsored a study to follow up on NJ P.P. 1986 c103, which took effect in 2008 and mandated as one of its provisions:

“The board of directors, or other governing body of a facility, shall include at least one resident as a full voting member of the board or body. Resident member shall be nominated by the elected representatives of the residents and selected by the board of directors of other governing body.”

Each of the 24 continuing care retirement communities (CCRCs) in the area covered by ORANJ was asked to identify the resident(s) who were or had been serving on the board or governing body. Each community provided at least some information.

The results showed that 22 of the 24 communities in ORANJ have at least one resident board member. Two communities do not and one of these has asked to be exempted from the mandate.

In keeping with the legislation, these resident board members had been nominated by the residents and appointed by the boards of trustees.

All respondents were voting members and reported having brought at least some items to the board’s attention.

Many reported communicating with the residents on the board’s behalf.

Most programs in the communities that had established resident board member programs *before* passage of the law, the “Experienced communities” differed in important respects from those that had established such pro-

grams *after* the law took effect, the “New Communities.”

The boards of trustees on which resident board members served in the Experienced Communities tended to have true executive powers in establishing budgets and evaluating management, whereas boards on which resident member served in the New Communities were more likely to be discussion forums without executive powers.

The boards of trustees in the Experienced Communities tended to have more clearly defined committee structures than the boards of the New Communities.

Resident board members in the Experienced Communities tended to have more effective working relationships with their boards of trustees than did those in the New Communities.

Several resident board members in the Experienced Communities emphasized that it required considerable patience, time and effort to develop effective working relations with both management and their boards. Some of these CCRCs have had residents on boards for up to nine years.

Some respondents from the New Communities recognized that their programs had not yet achieved their full potential and described their programs as “evolving”.

Several respondents hoped that ORANJ would provide further guidance to help their communities to develop effective resident board member programs.

Reprinted with permission from
The Orang Tree, October 2010.

Transparency Study Report: Organization of Resident Associations of New Jersey (ORANJ)

In November of 2010, ORANJ reported on its transparency study that gathered information by questionnaire sent the President of each Resident Association related to ORANJ. To encourage candid answers, the promise was made not to reveal the names of the Associations, nor of the respondents selected by the Presidents. After telephone follow up calls, 22 of the 24 questionnaires were returned.

The general conclusions were that most of the respondents from ORANJ communities felt that they have a fairly good level of transparency. This depends on the openness of Boards and managements to making such information available. In at least some of the smallest com-

munities, a close personal contact and monthly meetings with open management may contributed to residents feeling of transparency, even if they do not actually receive as much financial data as do residents in the larger communities.

Of particular interest to our readers will be the following possible ways to increase financial transparency with the suggestion that these might be tried if they are not already in practice.

- Persuade your Board to hold quarterly open meetings with residents to discuss finances and proposed changes in policies, programs and services.
- Encourage Boards or Trustees to give meaningful assign-

- ments to their resident Board Members, especially committees or tasks that would help increase transparency.
- Arrange to have your committees, and, or their chairpersons, met with management counterparts every month.
 - Have your Association President meet monthly with the Manager/CEO of your community.
 - Encourage Residents Board Members to attend BOTH all closed and open meetings of your RAC/Executive Committee in order to keep fully up-to-date on issues of importance in their communities and to pass this information along to their Boards.
 - Encourage management to hold more frequent open meetings with residents such as monthly, or even quarterly depending upon other patterns of effective communication in your community.
 - Identify specific needs in the community that both management and residents recognize, such as conservation of energy or others mentioned earlier in this report. Find resident expertise that can help develop solutions. Then encourage management to set up a joint committee that would discover ways to meet that need. That could help develop a climate of teamwork, partnership and trust in the competence of residents.
 - In your Finance Commute take increase initiative to ask

- management for the instruments that you need and the information that residents deserve. Find publicly available financial instruments from government sources and on the Internet.
- Make IRS Form 990 available to any resident, on request, and publicize its availability. Convince your management to distribute your board's annual reports and audited financial statements.
 - In key committees, such as the Finance Committee, find ways to increase the number of members with significant expertise so that management will welcome their input as helpful advice. From this, a feeling of partnership with management may grow. This in turn might gradually encourage increased transparency, provided that members are careful to maintain appropriate confidentiality.
 - Work with Management to increase the opportunities for the Finance Committee to help in the development of the budget. For example, help them realize that knowledgeable residents may be in the best position to identify potential cost savings.

Special thanks to ORANJ President Dan Hartley for making the report available in time for this issue. For full report, see <http://www.oranjccrc.org>

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Members since November/December 2010 *LifeLine* . . . Welcome and Farewell

California

Carlsbad by the Sea
Jane H. Walker

Georgia

A. V. Powell & Associates
A. V. Powell (LIFE)

We extend sympathy to the families and friends of these members who have died recently:

Connecticut

Stoneridge
Jane C. Hole (LIFE)
Dean Hole
Robert L. Scilian (LIFE)
Ruth H. Walsh
(upgrade to LIFE)

New York

Canterbury Woods
Harold Fletcher
Arthur R. Taylor

District of Columbia

Ingleside at Rock Creek
Karl F. Hawver
Edward Holmes

District of Columbia

Ingleside at Rock Creek
Joan Fiske Adams

North Carolina

Deerfield Episcopal Retirement Community
Deerfield
Carl F. Aufdermarsh
Fred & Ethel Brooking
Bill & Alison McNutt
Marilee S. Van Wye
Terry & Suzanne Vermilye

Florida

Estates at Carpenter
Doris Houghton (LIFE)
Rodney Colson (LIFE)

Florida

Estates at Carpenters
Ervine & Norine Byrnes
Sue Kain (upgrade to LIFE)

Pennsylvania

Foxdale Village
Jennifer Goetz

North Carolina

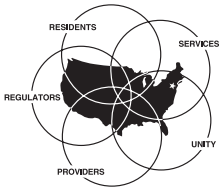
Deerfield
Alice Kritulis

We ask all readers to report to us changes in member addresses and also to report the names of those who have died.

Marleen Varner, Editor
National Continuing Care Residents Association
 16 Salisbury Dr., Apt. 7205
 Asheville, NC 28803



NATIONAL CONTINUING CARE RESIDENTS ASSOCIATION
 a 501(c)(3) Corporation



NaCCRA Membership Application

NaCCRA Thanks You for your support • By Working Together We Can Succeed

Date _____

Name of Individual: 1st Person _____
 2nd Person _____

Address _____

Telephone _____

Email _____

Name of Community Resident's Association _____

ANNUAL DUES PER (EACH) INDIVIDUAL.. \$ 15.00
LIFETIME INDIVIDUAL MEMBERSHIP \$ 150.00
 Annual Dues per Community Association..... \$ 150.00
 Annual Dues per State Association..... \$ 400.00
 Tax-exempt Contribution \$ _____
Total Enclosed..... \$ _____

Please make your checks to: NaCCRA
 and return this notice with your check to:
 Coburn Administrative Services
 4727 Deter Road, Lakeland, FL 33813
Your Check is your receipt.