



NaCCRA LIFE LINE

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

National Continuing Care Residents Association

PRESIDENT'S MESSAGE

WOW! DYNAMITE! AWESOME! FANTASTIC! BEST EVER! The best way to describe our annual meeting held recently at Ingleside at Rock Creek. We opened the session with 72 individuals from several states and communities. After an appropriate welcome by the leadership at Ingleside and knowing that some members do not remain for all the sessions, we immediately split into three discussion groups to discuss: our dues structure; expansion of membership; advertising in the *Life Line*; and if we needed a Residents' Bill of Rights. The recommendation of the members present was that we should not advertise in the *Life Line* at this time. We should raise individual dues to \$20.00 but leave the dues at \$30.00 for a couple and leave community and state dues at the present level. We should make an all out effort to expand our membership and we really need a Residents' Bill of Rights. Some items recommended to be included in the NaCCRA recommended model Residents' Bill of Rights are: Governance and Management - residents as equal voting members of governing boards - transparency of all financial matters; Grievance - clearly defined procedures for solving disagreements; Residents' Associations - summary of model by-laws to show organizational framework, officers, committees and relationship with management - association of relatives and Representatives of infirmed residents

- purposes and organization. Application of Bill of Rights - to certification or quality first - to possible legislation. What we want to happen next is for states, communities and individuals to react to these recommendations with your changes, additions or deletions. After that they will be consolidated and rewritten in the proper format and published for another membership review. The plan is to have a final recommendation regarding a dues increase ready for our fall meeting and a final model Residents' Bill of Rights for the fall meeting for presentation to the AAHSA House of Delegates for their adoption. I need all recommendations by June 10, 2008.

After these work groups we had a long lunch meeting with four outstanding speakers. First Rev. Robert Bell, President of the Board for Ingleside at Rock Creek, Westminster at Lake Ridge and Ingleside at King Farm, gave a warm welcome to everyone and an update on Ingleside at King Farm.

Brian Robare, Director of Operations for The Estates at Carpenters, presented inspirational remarks on why management needs resident input and why management and residents must work together and why both management

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NaCCRA Officers...

President.....Charles D. Paulk, Lakeland, FL
paulk65@gte.net

Vice President.....Marleen Varner, Lakeland, FL
travelgal2342@aol.com

Vice President..... John T. Mathison, Washington, DC
jmathison1@earthlink.net

Treasurer.....Robert J. Gault, Lakeland, FL
RJG327@aol.com

Secretary..... Anne Winslow, Jamaica Plain, MA
annewinslow@hotmail.com

Executive Committee Alex Kaufman, Cockeysville, MD
ackauf@comcast.net

Robert F. Negele, Stamford, CT
RNegele@optonline.net

Past President..... Milt Brummer
Lakeland, FL

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Minutes of the NaCCRA Annual Meeting, April 3 & 4, 2008

The Annual Meeting of NaCCRA was called to order at 9:30 am on April 3, 2008, by President Charles Paulk in Ingleside at Rock Creek Park in Washington DC. We were welcomed by Jack Mathison, VP for membership, and Bob Angus, President of the Ingleside Resident Association. There were 72 residents in attendance from Ingleside, Knollwood and Thomas House, DC; Carpenters Estates and Sandhill Cove, FL; Asbury Methodist Village, Maplewood Park Place and Bethesda, MD; VA Mennonite Community, Harrisonburg, Patriots Colony, Williamsburg; Westminster at Lake Ridge; Greenspring at Springfield, Goodwin House, Baileys Crossroads, VA; Edgehill, CT; and Springhouse, MA. President Paulk explained that he wanted residents to meet in small groups to discuss the following topics: 1) annual dues, 2) advertising in the *Life Line*, 3) expanding our membership beyond the East coast, and 4) the need for a "Residents Bill of Rights". Carlton Cove in Alabama failed with no protection for the residents. 55% of CCRCs have at least one independent resident on its Board. Some have up to 3. In Florida, one community has a resident president of its Board.

Discussions were led by NaCCRA board members but time did not allow conclusions on all issues; however, there was universal agreement that dues could be raised to \$20 per individual and \$30 for a couple. Community dues would remain at \$150. Residents could form a Chapter with 25 paid members. There should be no advertising in the *Life Line*. There should be a resident in charge of soliciting individual members in each community. In-house TV could be used to teach residents about NaCCRA. Reports should be given at association meetings. It was agreed that a Bill of Rights is needed and should include:

- A. Rights and responsibilities of residents and management by written contract dealing with legal elements of residential and health care life.
- B. Residents should be represented on the Governing Board by clearly defined procedure of selection, responsibilities and conflict of interest. The financial management should be transparent.
- C. A resident association of independent residents should outline their rights and responsibilities. An association of relatives and representatives of infirm residents is desirable.
- D. The Bill of Rights could apply to community certification and possible legislation.
- E. There should be a well defined grievance procedure for residents.

A Power Point video was shown in the theater before lunch, a delicious buffet served in the dining room allowing everyone to take the opportunity to meet others.

Brian Robare, Director of Operations of Carpenters Estates, FL, spoke on the necessity of management/resident cooperation, of treating employees well in order to have

them treat residents well in return and to obtain an increase in occupancy. This mutual interest has served Carpenters well.

Ann Burns Johnson of Aging Services of CA, a state affiliate of AAHSA, told us that California recommends that residents serve on the Board, on committees and assist at conferences. They give a "Resident of the Year" award. Changes in the law have now included residents on Boards, in financial oversight and quality of care. They recognize consumer expectations for larger apartments and different arrangements within each level of care in CCRCs.

Larry Minnix, CEO of AAHSA, gave an extremely well received talk printed elsewhere in the *Life Line*.

Stephen Maag, Dir. of Assisted Living and Continuing Care, AAHSA, reported that there will have to be some kind of Medicare bill dealing with MD's reimbursements and skilled nurses. There is a chance of a lame duck session after the election. www.aahsa.org will give you sample letters to write congress. During the Q&A, Steve reminded us that fair housing is a civil right and private duty care by the resident does not affect the budget of the community. However, providers from outside the community should be subjected to the same background checks as employees. In regard to moving residents to a different level of care, he doubts that a contract could be written that wouldn't be challenged. The California case was postponed in February awaiting an independent medical report. There seems to be a move away from the CCRC as we know it in favor of the condo, co-op, group consortium for care at home. At the conclusion of the remarks from our guests, the meeting returned to the agenda. The minutes of the 2007 meeting were not read since they had been printed in the *Life Line*.

The Treasurer's report was accepted and the recommended Budget was approved. It was voted to hire Coburn Administrative Services, 4727 Deter Road, Lakeland, FL 33813, to handle membership mailing the *Life Line* at \$20/hr plus expenses. The total cost should average about \$100 a month. It is anticipated that this cost will increase in the near future.

Jack Mathison, VP for Membership, recommends that each community appoint a resident to recruit NaCCRA members. Every new resident should be introduced to NaCCRA and be encouraged to join and receive the *Life Line*. Those of us who are members should speak to our friends in other communities to join.

VP Marleen Verner's report, "Seniors are going Green" is printed elsewhere in the *Life Line*. She has recently discovered that used carpets can be recycled. Email her for details.

President Paulk mentioned the need to update our website. Suggestions were made because many people thought \$1,000 was too expensive: how about using a student who will receive college credit? We must appeal to younger potential residents, possible "boomers". We need

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New Members since last Life Line...

Welcome!

Connecticut

John & Rosemary Merrell
Mary E. P. Davies

Elinor M. Georgopulo
Rene' E. Samson

District of Columbia

Christopher Van Hollen
Beatrice Fuller
Charlotte A. Leedy
Jack Cadeaux
Dr. William B. Clotworthy
Rhoda C. Nixon

Ilse Grainger
Ellen McKay
Vivian Norden
Dario Barozzi
Dixie Lee Falvey
J. Richard Stoltz
Louise Winfield

Florida:

Catherine C. Eastman
Ruth Baluh
Hellen J. MacGregor
William D. Ramsey
Anna Clark Petry
Eleanor M. Davis
Olive Gambrell
Jane Chrismer
Eleanor O'Halloran
William & Delia Ludlum

Thomas J. Meredith
Joseph Weinreich
Rosella Purcell
Richard & Theresa
Suetterlin
Howard Shanks
Thomas & Lois Cuppett
John L. Miller
Lake Port Square
Community
Louis Taylor

Maine

Ernest C. Marriner

Maryland

John M. Warner

Massachusetts

Angelo Giambusso
Ralph Berlowitz

Tennessee

Jeane S. Raper

Virginia

Irene Estes
Carolyn B. Shubart

***This is a great addition
to our membership.***

***Join me in extending a
warm welcome to all.***

***Together we can do
great things.***

PA REPORT

Major legislative issue...

...to fund nursing home facilities

Within Pennsylvania, the major legislative issue in the state concerns Governor Rendell's budget proposals to fund nursing home facilities. PANPHA has campaigned actively against the budget since February 20th because it includes no increase in state Medical Assistance rates for nursing home care. Ron Barth, PANPHA president, attacked Rendell's proposed funding of school laptops and alternate energy development as "extras", while not adequately funding "things the government has already promised." The PANPHA website features editorials from the Carlisle Sentinel and the Lebanon Daily News supporting this position. On March 23rd, Nora Eisenhower, Secretary of Aging, and Estelle Richman, Secretary of the Department of Public Welfare, responded in a letter to the Sentinel and other papers pointing out that Pennsylvania's nursing homes have received state payments that "grew 34 percent faster than the rate of inflation over the last five years," and that "state funding for all senior programs grew much faster than spending on public education." They said that only New York spends more on nursing homes than Pennsylvania. Both the Senate and the House have held hearings on the Governor's budget, but no definite decisions have yet been reached, although we should expect this issue to be resolved before our next quarterly meeting.

If you wish to contact your state legislators, the easiest way is to use a website: www.legis.state.pa.us, and punch in your zip code to get the information you need.

The other important state issue is an administrative one. Last summer the legislature passed a bill requiring separate licensing of personal care homes and assisted living facilities. The regulations to carry this out are still being formulated by the Department of Public Welfare. Nick Luciano of PANPHA reported that the Department organized a working group of stakeholders that held meetings from October 17 until last Tuesday to try to compromise issues. The Department of Public Welfare is now working on the regulations.

*(extracted from OPARC Newsletter, April 9, 2008)
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AAHSA introduces Inaugural 'Homecoming Week'

"Community Treasures: Celebrating the Gift of Age" is the theme of the American Association of Homes and Services for the Aging's first annual "Homecoming Week" event, May 26-30. The objective is to shine a spotlight on senior living communities by having providers host open houses for neighbors, businesspeople, government officials and media. The comprehensive planning packet, available online at www.aahsa.org, also includes useful information on using the program to further an organization's social accountability goals.



Sign in an Optometrist's Office:

*"If you don't see what you're looking for,
you've come to the right place!"*

Sign in a Veterinarian's Waiting Room:

"Be back in 5 minutes. Sit! Stay!"





RESIDENTS BILL OF RIGHTS

April 3, 2008

- I. NaCCRA AGREED **BILL OF RIGHTS** is needed.
- II. Possible STANDARDS for such a BILL OF RIGHTS
 - A. LEGAL - Rights and Responsibilities of contractual parties - Residents and Management - should be spelled out to include comprehensive listing of all the legal elements of residential and health care life to be in contracts.
 - B. GOVERNANCE AND MANAGEMENT
 - Resident representation on Governing Board the selection, responsibilities, avoidance of conflict of interest
 - Transparency of financial management.
 - C. RESIDENTS ASSOCIATIONS
 - RESIDENTS COUNCIL AND ASSOCIATION - Summary of model *By-Laws* to show organizational framework, officers, committees; relationship to Governing Board and Management
 - ASSOCIATION OF RELATIVES and Representatives of Infirm Residents - purposes and organization.
 - D. APPLICATION OF **BILL OF RIGHTS**
 - to certification
 - to possible legislation.

Above is the summary of notes taken during the discussion of NaCCRA adopting a model Residents Bill of Rights. Every Resident with an idea regarding what your Bill of Rights should contain should send them to:

Charles Paulk,
1001 Carpenters Way, C117, Lakeland, FL 33809;
paulk65@gte.net; fax 863-816-2065.

We also desire consolidated submissions from state and community associations. We must have all input by June 10, 2008.

NEWS REPORT

83-year-old foils purse snatcher

An 83-year-old great grandmother used her iron grip to thwart a would-be purse snatcher. Bernie Garcia of Santa Fe, New Mexico, said a young man approached her as she was buying gas for her van and asked for money. When she said no, he tried to grab her purse. But Garcia fought back, spraying him with gasoline and then holding tight to her purse as he pulled her to the ground and began dragging her. Fortunately another customer intervened and scared off the attacker, who was apprehended shortly after the incident.

Garcia, interviewed later, said she was a little sore but otherwise felt fine. My son told me I should have just given up my purse, she said. "Hell no, I told him. That was my purse. I was fighting for what was mine."

Reprinted with permission of Aging Services of California.

NaCCRA Annual Meeting

By Bob & Barbara Gault

Having taken over the treasurer's job after John Olsen had passed away, Charlie Paulk asked if I intended to be at the annual meeting to give the treasurer's report for 2007. I told him I didn't think so, as my wife Barbara, because of an automobile accident, was still in a halo and we didn't know what was ahead of us. As the healing process was taking effect and after 3 months, she moved into a hard collar. We thought the change of pace and looking at a different set of walls might be good therapy, so we sent in our money for registration and had a great week in our nation's capital. In talking it over, there were three things that impressed us the most. Number one were the people that we met, number two were the meetings that took place on Friday and Saturday, and the third was having time to see so many things in Washington.

To explain number one, we met so many wonderful people. That seems to go along with living in a CCRC community. Charlie had invited us to ride up with him and Laverne. Though we had never met Laverne we found them both easy to travel with. After checking into the Ingleside at Rock Creek outside the hustle bustle of D.C., we had been invited to a cocktail hour at Vice President John Matheson's apartment, where he had invited another dozen people. We got to know everyone in a hurry. Later we were John's guests at dinner. During the course of the week, we met several more people including our secretary Ann Winslow, who hails from my home state of Massachusetts. She is very outgoing and you like her as soon as you meet her. Also it was great to see Vice President Marleen Varner who now resides in Tennessee but did live in our community in Lakeland, Florida. Everywhere we went that week at Ingleside, both residents and staff, were just great, just like it is here at The Estates at Carpenters. Another gentleman that I must mention is Fisher Howe, who is a legislature consultant for NaCCRA. He has spent a lot of time in my hometown of Plymouth and it was most enjoyable talking with him.

Number two on our list was the two meetings that we attended. The first went from 8 AM to 7 PM. We were served a continental breakfast before the meeting started. We strayed from the usual reports from the secretary and treasurer and formed groups where we held round table discussions on different subjects. We broke for a very nice lunch at noon. To start the afternoon, we had three great speakers who were very informative and most interesting. After a very nice evening dinner, we came back to wind up the round table discussions we had had earlier in the morning. A long day, but very interesting. The next morning we again started off at 8 AM after another continental breakfast. We had got back on track with the secretaries and treasures report, received the reports from the round table discussions and went on to elect a new president and a new office added to the slate being that of Executive Director.

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Principal Speaker at NaCCRA Annual Meeting Luncheon

Larry L. Minnix, Jr., President and CEO of the American Association of Homes and Services for the Aging (AAHSA), was the featured speaker at the NaCCRA Annual Meeting Luncheon, on Thursday, April 3, 2008, at Ingleside at Rock Creek in Washington DC. He highlighted the importance of strong senior management teams to meet today's senior housing challenges. He complimented the leadership of Anne Burns Johnson, CEO of Aging Services of California, another NaCCRA speaker, and that of Jane Gayle Boyd of the Florida Association of Homes and Services for the Aging.

He expressed appreciation for our NaCCRA President, Charles Paulk, for his service on the AAHSA House of Delegates. He invited members of our executive committee to come as visitors to the House of Delegates at the next AAHSA Annual Meeting October 12-15, 2008 in Philadelphia where the conference theme will be *One Voice*. He also offered five complimentary conference registrations to NaCCRA members who have never attended an AAHSA Annual Conference, emphasizing the importance he places on cooperation between managements and residents!

The availability of low rent housing to low income seniors has now reached serious crisis, with five persons on the wait list for every low rent space. Members were reminded that all of us are aware that every one of us either has been, are, will be and will need to have a caregiver.

A keen champion of quality in senior housing, as evidenced in the strong commitment to his Association's Quality First initiative, he chose to define quality by asserting that there should be only two kinds of senior residences: excellent in quality or nonexistent. His inspiration seemed to have come from his personal experiences with his own mother when she was a quite dynamic resident of Wesley Woods in Atlanta where she became the head of opposition to management!

Quality is possible if we start one organization at a time. We need a **Model Resident Bill of Rights** and challenged NaCCRA to develop a five point model for all of us, **both** residents and management to agree upon. Recognize **that** we have **many cultures** important in the quality initiative, from the kitchen to the Board Room. Good managers hire and develop employees who come to work for residents!

Financing of senior housing and care is a critical issue and he suggested we need a national insurance trust. Forty-seven million people in this country do not have health care insurance; 250 million do not have long term care insurance.

Technology is essential to free more time for direct resident and patient care, citing clinical care caretaking. How we handle **transitions** is another area of serious concern to help assure that quality of life is not lost in transfers from one level of care to another, as it is now for many, leading to the newer initiatives for aging in place.

In closing, Minnix referred us to Erik Erikson's eight stages of life (infancy, early childhood, play age, school age, adolescence, young adulthood, middle adulthood (35-55 or 65) and late adulthood (55 or 65 to death) and cited these secrets of life: 1) chose your parents well (carefully choose your gene pool!), 2) make wise choice of life style; 3) develop positive attitudes, 4) develop the ability to laugh and to cry, and 5) reminded us that those who maintain faith and hope do best.

We can teach that aging is a fulfilling part of living. There is always tension between autonomy and community for seniors, and reasonable rules and regulations help facilitate our desired sense of community for successful and we hope graceful aging.

Reported by Marleen Allen Varner, NaCCRA VP

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NaCCRA Annual Meeting

The new president come October will be John Mathison, probably one of the most popular and hard workers living at Ingleside at Rock Creek and the new office of Executive Director will be Charles Paulk, a man that is very given of his time and energy, whether it has been the local, state or national organizations. He loves his work and it shows.

Now we get to number three and that is the time spent sight seeing. On the Saturday we arrived in Washington, Charlie and Laverne took us to Arlington National Cemetery, where we were able to board a tour bus and visit the grave of the Unknown Soldier, arriving just in time to view the changing of the guard. It certainly is a most impressive and touching ceremony. On the next three days, Charlie was off to meetings so Barbara and I took advantage of the free time and took in the Korean Memorial, Lincoln Memorial,

National Cathedral and stayed on the bus to view the White House, Capitol Building, Pentagon, Washington Monument and all the different embassies. On the most sunny day of the week we were fortunate to be able to go with the residents of Ingleside on a bus tour to enjoy the cherry blossoms at the peak of their bloom. Thursday Charlie was free, so he and Laverne took us to Mount Vernon. We found that a very beautiful and interesting place. So if you want to go to the next annual meeting in Philadelphia, come a few days early or stay a few days after, and enjoy both the meetings and the City of Brotherly Love. You will enjoy and learn from both. We certainly did and we thank Charlie, Laverne and John, our new president, for allowing us to enjoy their company. I see our new President has put out a directive listing the duties of the President and Executive Director. John has nine and Charlie has ten. John has already learned to delegate.



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Minutes of NaCCRA Annual Meeting

more links, condensation, applications for membership should be available. Have a link to state communities for follow-up.

At the invitation of Jack Mathison, we enjoyed a happy hour in the lounge overlooking Rock Creek Park while our meeting room was prepared for a formal dinner.

Our after-dinner speaker was Doug Pace, VP of AAHSA. He presented copies of the final report of the National Commission for Quality Long-term Care (bipartisan group appointed three years ago with co-chairs Former Senator Bob Kerrey and Former Speaker Newt Gingrich) "From Isolation to Integration, Recommendations to improve Quality in Long-Term Care". The table of contents lists Quality, Workforce, Technology and Finance.

Unfortunately the finances were too difficult to make a final report; however, AAHSA has been studying the problem of 240 million Americans without insurance and realizes that congress must take action. AAHSA recommends a National Insurance Trust to be financed by individual Premiums. The funds would provide for services beyond Medicare, not replace it. An independent, federally-chartered organization would manage premiums and assure the money is used only for this program.

Following a short discussion, the meeting was adjourned until 8:30 Friday morning.

On Friday morning we were served breakfast in our meeting room where everyone came in informal attire to hear state reports and closing remarks of President Paulk.

Bob Negele reported that Connecticut had 14 member communities. Having had 3 changes of ownership in the past 8 years, they are working on a Resident Bill of Rights. Using the New Jersey procedure, CT residents take a property tax deduction on individual income tax returns. Edgehill is cooperating with the Whitney Center on conservation. In May they will have a local authority, Dr. Keating, speak on Fear of Aging and in October, the Bill of Rights with AASHA assistance will be the topic of the meeting.

FLiRCA Louse H. Freeman reported that Florida's CCRCs and residents expect the economic downturn will directly affect them. A \$3 billion budget shortfall is forcing a 10% cut in all state programs and services. The reduction in reimbursements in Medicaid will shift these costs to private pay residents. Every 20 years a Taxation and Budget Reform Commission meets. Currently this commission is expected to propose a reduction in property taxes, increase some sales taxes and remove some exemptions. A sales tax may be assessed on entrance fees. A recent bill in the two houses focusing on financial disclosure and governance of CCRCs was withdrawn after agreement was reached between Resident Council and the provider. It opened up a dialogue about the role of the Governor's Continuing Care Advisory Council to mediate issues of this type. There are

three FLiCRA members on that Council. FLiCRA is currently monitoring 30 pieces of legislation.

MaCCRA William Root, President of Asbury Methodist Village reported that Maryland is involved in legislative procedures for resident grievances and has established 3 study groups to study the definition of "provider", resident appeals from Dept. of Aging decisions and the increased cost of drugs when moving into skilled nursing because of the restriction of ordering for a 90 day supply. There is evidence that the parent company has passed escrow funds among their other facilities instead of using the income to payoff bonds. This action could result in there being insufficient money available to pay the guaranteed return of purchase to the residents' heirs. Mr. Root would appreciate hearing from anyone with interest in these three areas: waroot@aol.com (301-987-6418).

MLCRA Massachusetts reported that a special commission to study the need for protection of residents in Continuing Care Senior Lifestyle Retirement Communities has been voted. It will consist of 18 legislators and state administrators, 4 experts appointed by the Governor, and the Pres. of New England AARP. To date MLCRA has received no representation. The Commission is to report back in 2 years!

ORANJ Gary Baldwin reports that after over four years of hard work, a bill was approved giving residents a voice in their governance. Gov. Jon Corzine accepted an invitation to attend the public signing of the bill at Seabrook Village. At least one voting resident will serve on the Board of Trustees. Said Board is required to meet at least quarterly and discuss with residents any proposed action which might significantly affect their well being or the financial stability of the facility BEFORE taking the proposed action. A handout was prepared, after study of five different community residents, containing necessary information for the nomination of resident board members. ORANJ has completed a "CCRC Finance Guidebook" for use by resident members of CCRC finance committees to answer the question, "Is your CCRC in good health - financially?" www.oranicccrc.org ORANJ has begun an agenda to deal with conservation and environmental issues.

VaCCRA Ron Levin reported a successful year for CCRCs in VA. They have a strong relationship with their House of Delegates through Vivian Watts who spoke at two meetings. They welcomed a new member, The Virginia Mennonite Retirement Community in Harrisonburg. Their bimonthly Newsletter is their most important project. VaCCRA members continue to email and phone State and Federal legislators to express their views.

President Paulk presented a slate of officers without a name for a new president. Nominations from the floor were opened. John Mathison, VP of membership, was nominated

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~ Need Some Help ~

From: Alfred LeBlang [golfski02@yahoo.com]
Sent: Friday, April 11, 2008 3:04 PM
To: paulk65@gte.net
Subject: Need Some Help

Hi Charles,

Hope you are doing well and enjoying your retirement.

Do you know any experts on the GAAP and Other Not For Profit handling of Donation both Principal and Earning relating to Restricted and Unrestricted Funds?

We are interested in any cases where the question of whether the Restriction has to be placed by the Donor or can the Recipient place the restriction based on the Funds Documentation.

Any help will be appreciated.

Al and Pat LeBlang
350 Ponca Place, Apt # 137
Boulder, CO 80303
tel # 720-562-8046

Any resident with information on the above subject can send it to me and I will forward to Al. Or you can send it directly to Al and forward me an info copy.

Thanks, Charles

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Minutes of NaCCRA Annual Meeting

and the nominations were closed. The elected officers for 2008 are: President, Jack Mathison; VP, Marleen Varner, VP, George High; Secretary, Anne Winslow; Treasurer, Bob Gault. Charlie Paulk, Past President, will continue to oversee mailings and printing of the *Life Line*.

The Fall meeting with AAHSA will be in Philadelphia, October 12-15, 2008.

The Spring meeting will be April 23 and 24, 2009 at Westminster at Lake Ridge.

President Paulk left us with the following goals for 2008:

- 1) Support Quality First and accreditation
- 2) Expand membership beyond the east coast
- 3) Complete the Resident Bill of Rights
- 4) Support excellence in Nursing Homes
- 5) Support excellence in Assisted Living
- 6) Support Seniors living at home
- 7) Promote the CCRC industry
- 8) Publish 6 issues of *Life Line*

The meeting was adjourned at 12 noon.

Anne Winslow, Secretary

MEET OUR NEW PRESIDENT

The Rev. John T. Mathison (Jack), retired Presbyterian pastor from Ingleside in Rock Creek, Washington DC, was unanimously elected President of NaCCRA for the coming year at the recent Annual Meeting. Jack has served our association with distinction as Vice President for Membership for the past two years. He was President of the Ingleside of Rock Creek Residents Association for two years and currently is a voting member of the Board of Directors of Westminster-Ingleside.

Jack served in the US Air Force as a navigator during World War II. He was shot down and interred as a prisoner of war at StalagLuft 1 in Germany for about a year until liberated by the Russians. On return to private life he earned a BS degree from the University of Wisconsin. After working for a few years in industrial sales, he entered Union Theological Seminary, New York, where he earned his M. Div. degree. He has served churches in NY, NJ, OH, IL, and KA. Before retirement he was Senior Minister of New Providence Presbyterian Church, Maryville, TN.

Throughout his career, Jack has been very involved in religious and community organizations. His church activities included service as Interim Executive and Moderator of the Presbytery of Chicago, several commissions and task forces for the Union Presbytery-TN, the Synod of Illinois and the Synod of the South. For several years, he served on the Council of Administrative Services of the General Assembly Executive Committee. He has also served on the Boards of Directors and committees for numerous public service organizations.

Currently he serves on the Boards of the Council of Churches of Greater Washington, Westminster-Ingleside, the Funeral Consumers Alliance of Metropolitan Washington and the League of Women Voters. He is an active member of the American Association of Homes and Service for the Aging.

Jack moved to his residence in Ingleside at Rock Creek in 2001, following the death of his wife Elaine Souerwein in Kennebunkport, ME, in 2000. The family includes three children, Paul, Thomas and Jane who is an elder in the Bon Air Presbyterian Church in Richmond, VA.

Jack is known as an enthusiastic CCRC facility and CCRC resident advocate, is enthusiastically supported by colleagues at Ingleside and can be found on occasion to have a rather wicked sense of humor! Hail to our new Chief!

Jack will take office October 12, 2008.

Marleen Allen Varner
257 Wiggins Creek Drive
Sewanee TN 37375-3032
931-598-0714
cell 931-636-1238



Report on the National Senior Conservation Corps – April 14, 2008

Is bridge, the card game, the opiate of the retired classes? Perhaps not; in a well-regulated game, people ignore the random messages of the cards and talk to each other. Never mind about whom. Conversation, itself, is associated with lower probability of dementia.

For 3 billion years, the planet stored carbon in oil, coal, natural gas. Then came the industrial revolution and in a mere 150 years humans burned that stored carbon at an accelerating rate, releasing millions of tons of CO₂ into the atmosphere. This rapid reversal of nature's billion-year program was bound to change the natural balance. Would that change the earth's weather and temperature? Of course it would.

It is still happening at an accelerating rate. The delicate balance that made Earth habitable has been upset. Soon, that change will be irreversible.

Scientists believe, perhaps too hopefully, that urgent, massive changes in human behavior can halt the deterioration of nature and that Earth can be made habitable - even for Africans and South Asians. But for that to happen, everyone must do his or her part.

Clearly, an opiate much more virulent and pervasive than bridge is at work. "Inertia" is a better word. (Or, if dementia is a state of forgetfulness and confusion over what is important, how many of us are already, in some sense, demented?)

So we have created the NATIONAL SENIOR CONSERVATION CORPS, dedicated to the proposition that seniors can contribute to restoring the planet to health again. The heavy-duty paper work is almost done: we have incorporated and filed for 501(c)(3) status; shortly we will respond to a foundation's invitation to apply for a grant.

Who are "we"? The initial founding Board of Directors is: John H. Adams, co-founder of the Natural Resources Defense Council; Arthur Galston, Eaton Professor Emeritus of Biology at Yale (and founder of the Yale bioethics program); Neva Goodwin, founder and co-director of the Global Development and Environment Institute; Robert E. Lane, Eugene Meyer Professor Emeritus at Yale; and James Gustave Speth, Dean of the Yale School of Forestry and Environmental Studies. Our Webmaster is Bonnie Turner, a volunteer from the Yale Library, and our counsel is Lisa N. Davis. Robert Lane will serve as President until a younger person can be found. When we are funded we will, at last, have an Executive Director.

What do we do? Building on the work of a small volunteer group at Whitney Center, a CCRC in Hamden, Connecticut, we organize and serve resident-management Green Teams in continuing care retirement homes. So far, except for our counsel, we are all volunteers, so we work through email and our website, www.grayisgreen.org where we have posted our HANDBOOK on CONSERVATION for RETIREMENT COMMUNITIES. In that Handbook is information on conservation education, energy saving, buying green, waste management & recycling, transport

& CO₂ reduction, building green, gardening, lawns & housekeeping, and health & conservation. Every week our Webmaster and I answer many queries on special aspects of these topics.

The website also contains SHADES OF GREEN, a checklist for conservation practices in CCRCs, a set of posters, designed to reduce driving, called IS THIS TRIP NECESSARY?, signs requesting PLEASE TURN OFF THE LIGHTS, and a poster on the common sense argument about global warming.

Next Steps. There are about 2500 continuing care retirement communities in the United States, of which we are in touch with about 25, or one percent. In an adjoining category, there are about 37,000 assisted living homes, some of whose residents are ready for Green Teams. The next group in line includes the many seniors organized in civic, veterans, Masonic, self-education and self-improvement groups – people still engaged in social activities and available for conservation activities. Finally, there are about 40 million unorganized seniors, dimly aware of global warming, confused about its implications, needing information and guidance on how to help.

We are Not Alone. With its unique program of conservation in CCRCs and its potential for extending this work to individuals living alone or with their families, the National Senior Conservation Corps (NSCC) joins at least five other groups mobilizing seniors for conservation:

1. The federal and state **Senior Corps** whose members work mostly on such projects as mentoring adolescents and working on parks,
2. **Americorps**, whose 75,000 members do volunteer community work including "clean parks and streams;"
3. **Senior Environment Corps**, organized by Environmental Alliance for Senior Involvement (EASI) and often working through
4. **Retired and Volunteer Programs (RSVP)** and cooperating with state and local agencies on local projects.
5. **Green Seniors** is a private, non-profit, Anglo-American organization seeking, like us, to educate and inform seniors on conservation. They employ our Handbook for practical details.

We have been welcomed by these groups, can learn from them and help them.

Join the National Senior Conservation Corps:

www.grayisgreen.org

Robert E. Lane, President
National Senior Conservation Corps



2008 Spring Meeting of ORANJ Devoted to Environmental Issues

The first semi-annual ORANJ meeting took place on April 16 at the Medford Leas. After a brief business meeting, the morning was devoted to a presentation by Solomon Randall, Founder and Executive Director of NJ Sustainable State Institute, a Rutgers University think tank devoted to strategies to enhance sustainability in NJ. "Sustainability" or "Sustainable Development" means protecting the resources and systems that support us today so they will be available to future generations.

Mr. Randall pointed out that we have finite resources, i.e. air and water and that we need to live within these limits. Our consumption of these resources can be defined as our "ecological footprint." Thus, Princeton's ecological footprint requires an area 61 times the size of Princeton itself. The footprint reflects not only the number of acres needed to sustain a person but also by the number of acres lost by the trash generated by each of us. Therefore, we lose 4,000 acres of open space daily in part because each person produces 90,000 pounds of trash in his lifetime.

Even though the US has not signed the Kyoto Protocol, many of the cities have designed their own plans to deal with global warming. Among the strategies are efforts to decrease pollution by encouraging people to move more closely together and to increase the amount of open space. With higher population density public transportation becomes economically viable and pollution due to car travel decreases. Another set of strategies is the adoption of green building practices, which may be expensive in the near term.

He emphasized that it will be important to engage all sectors of society to bring about environmentally friendly changes in practice, including the public and private sector, the schools etc. But if we neglect such efforts we can expect catastrophic results from global warming. As an example, he pointed out that if the average high temperatures in NJ were to rise 15 degrees we could expect significantly less rain and the earth will become too warm to soak in whatever rain there is. To avoid such a disaster, NJ must mandate energy efficient practices, increase the amount of biomass used for fuel, and levy a carbon tax. He suggested as a target for NJ that 22% of our energy needs will be satisfied from renewable sources by 2021.

To help communities measure their effectiveness in combating global warming, his institute has developed a set of measurable goals, indicators, and actions. However, he pointed out that one of the problems with design of energy policy is that actions that lead to desired outcomes can also have unintended negative consequences. For instance, Brazil gets 50% of its fuel from biofuels but this decreases the food supply available to the population.

The afternoon presentation was made by Fred Profeta, a former mayor of Maplewood, NJ, and currently Deputy Mayor of Maplewood for the Environment. As he put it, "For me, the environment is the number one issue." But he was

optimistic that American ingenuity that is able to put a man on the moon will also be able to tamp down the "doomsday scenario" of the environmental movement.

He pointed out that Maplewood is known as a "green" community and has made great strides in that direction. It has been expensive but it has earned Maplewood a significant dividend. According to the realtors, residential properties in Maplewood have maintained their value despite the drop elsewhere.

He described the new police station as the first public green building in NJ. It has solar panels on the roof which, together with its tinted windows, reduces electricity consumption by 20%. The building also has sensors which turn on the light and reduce the amount of CO₂ when additional people enter the room. The savings from these strategies more than pay for the extra investments.

In addition, Mr Profeta has persuaded the community to commit to hybrid cars and he hopes that the entire municipal fleet will be green by 2015. Also, the community has instituted jitney service for commuters during rush hours, which, they calculate, will take 300 cars off the roads.

Mr. Profeta pointed out that we cannot yet evaluate all the effects of global warming. For instance, what will happen to our local trees and plants that cannot migrate north when local temperatures rise? What will happen to the ski industry in VT and NH when the snow disappears?

On the other hand, we can try to buy local products to reduce emissions from trucks that transport goods, and could benefit local producers. We can encourage the use of fluorescent light bulbs instead of incandescents, build bike paths and place racks where they will provide an incentive to use bicycles instead of automobiles. We can also plant trees, a good CO₂ sink and forbid the destruction of trees above a certain height unless they are deceased.

One of the main ways to encourage "green" is to develop the tool kits, such as new books in the "Dummies" series, e.g. "Environment for Dummies," help to establish criteria to measure whether efforts have been successful, and provide incentives to encourage effective strategies. As Mr. Profeta said, "This is our job. Can we do it? Sure but we need everyone to get aboard."

Ellen Handler



Sign on a Plumber's Truck:

"We repair what your husband fixed."

Sign on a Tow Truck:

"We don't charge an arm and a leg... We want tows."





(continued from front page)

President's Message

and residents must treat employees with respect and dignity. We are fortunate to have Brian working for residents.

Anne Burns Johnson, President/CEO, Aging Services of California talked about the many ways residents and management work together in California. Residents serve on all community boards, on board committees and assist with arrangement of conferences. Aging Services of California presents a Resident of the Year award. Anne is a true champion of residents and California is lucky to have her working for them.

Last but not least was our featured speaker, Larry Minnix, President/CEO of the American Association of Homes and Services for the Aging (AAHSA). Marleen Varner has a special report on Larry's presentation in this *Life Line*, but I want to mention a couple of items. First he invited the entire NaCCRA Board to participate in the House of Delegates meeting in October. Next he gave NaCCRA five registrations for first time attendees at AAHSA. Then he indicated that a Residents' Bill of Rights was needed and that after we get it finalized, AAHSA will co-sponsor it as a model for all states to follow.

The Morrison staff assigned to Ingleside served us in the Ingleside tradition. The food was outstanding and the servers were professional in all details. Although the staff is Morrison employees they responded and acted as if they were Ingleside employees.

After this great lunch, we returned to our agenda and approved the recommended budget for 2008. The new items in the budget are \$1000.00 to upgrade the NaCCRA Web Site and \$1500 to initiate membership management services and mail out the *Life Line*.

Steve Maag, Director of CCRCs and Assisted Living at AAHSA gave an update on activities in his area. One area of growing concern is the large increase of residents bringing individuals into the community to provide services. These individuals in most cases do not work for an agency, they have not had a background check, and do not carry

insurance. This puts all the residents in the community at risk. NaCCRA recommends that all individuals working in a community have background checks, carry insurance, are citizens and work for an agency.

Doug Pace, VP for Long Term Care at AAHSA, always gave a timely and valuable report during his dinner speech. Residents are fortunate to have individuals like Larry Minnix, Anne Burns Johnson, Brian Robare, Doug Pace, Steve Maag, Maggie Flowers and all the others from AAHSA and around the country working to insure that we enjoy a stress free life style.

The state reports on Friday morning were extremely informative. We missed the Presidents from NC, PA, NJ, MA, CT and FL. However, we did have representatives from CT, FL and MA, and a written report from NJ. The state President adds an awful lot to our meeting and hopefully next year all will be able to attend.

We have two actions from AAHSA that we need to support. Home Coming the last week of May. AAHSA has asked all member communities to plan Home Coming activities this week. Residents must join management to make this a great event for your greater community. It is a great opportunity to show case your home.

Next we must all get behind management in total implementation of Quality First. There is a Power Point slide show about Quality First for Residents on the AAHSA website (www.aahsa.org). Full implementation of Quality First will result in continued improvement for our communities.

The attendees elected a great slate of officers for 2008. The tone of all meetings is established by the individual charged with arranging the meeting. And the arrangements for this meeting were outstanding in all respects. They were made by none other than your President elect, Jack Mathison. Jack has devoted his life to service for his fellow man and I'm extremely pleased that he will be the next President of NaCCRA. Let us all join together to support him in taking us to the next level.

Charles D Paulk

NEWS REPORT

One-third of seniors have some diminished mental function

More than 5 million elderly people have a hard time remembering things, sorting through daily decisions and even sometimes knowing what day it is, according to the first national estimate of how commonly the minds of aging Americans are starting to fade.

Using detailed evaluations of a nationally representative sample of 856 people ages 71 and older, the federally sponsored study concluded that 22 percent have begun to see their mental faculties decline, which translates into 5.4 million people.

The findings show that mild cognitive problems are as common as diabetes in this age group, noted Brenda L.

Plassman, a psychiatrist at Duke University Medical Center who led the study published in the March edition of *Annals of Internal Medicine*.

Combined with a previous estimate that 3.4 million Americans have full dementia such as Alzheimer's disease, the new findings mean that more than one-third of people age 71 and older have some diminished mental function, the researchers said. About 25 million people in this age group live in the United States.

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Aging Services of California.



TO: Charles D. Paulk, Pres., NaCCRA
John Mathison, Vice Pres.

Congratulations to both of you for all you did to make the National Spring Meeting a success. Those of us from Knollwood Retirement Community who attended found the discussions very interesting and informative. We reported key ideas to our residents at our monthly meeting on April 12 and promoted membership. We hope that more of our residents will join.

There are two subjects we would like to learn more about and are wondering if you could tell us how other retirement communities handle these situations, or refer us to others who have more information:

1. What role does the administration of a retirement community (or others in the community) play in helping residents as they age who have no living family member, particularly in managing their health care, finances and general well being. For example, we have several retired Army or Navy nurses, who have no children or nieces/nephews and who have outlived other relatives and close friends. Do other communities have a "care system" for such individuals?
2. We heard about an "ombudsman" for retirement communities, and would like to learn the details about the pros/cons of this system and how it operates.

Thank you for any information you can provide.

Thelma Stevens Mrazek
President, Knollwood Retirement Community
6200 Oregon Ave, NW, Washington, DC 20015
mrazekts@comcast.net

Another opportunity to help your fellow residents. You can send information to me and I will forward on to Thelma, or you can send directly to Thelma with an info copy to me. Thanks for your support, Charles

☺ YOUR AGE BY EATING OUT ☺

Try this ... it only takes a minute.

Work this out as you read, and don't cheat by looking at the bottom of the page!

1. First, pick the number of times that you would like to go out to eat in a week ... more than one but not less than ten.
2. Multiply this number by 2.
3. Add 5.
4. Multiply the answer by 50.
5. If you have already had a birthday this year, add 1758... if you haven't, add 1757.
6. Now subtract the four digit year that you were born.

You should have a three-digit number.

The first digit of the number was your original number (the number of times you want to go out to eat). The next two numbers are your age! (Oh, yes, it is!)

This is the only year (2008) this will ever work!

A good ending to a sad situation in AL

My thanks to all the residents who provided information to Andy during this process. Together we can do great things. The greater our numbers, the greater our success. Charlie

From: Andy Setlow [mailto:andysetlow@att.net]
Sent: Friday, April 18, 2008 2:35 PM
To: Charles Paulk; Dick Spencer
Subject: Success!!

Maybe y'all know already -- especially Dick -- that ACTS will be the new owner of Carlton Cove. We strongly believe we are finally on the way to fulfilling the dream on which this community was founded.

Charlie, I need to thank you again for putting me in touch with Dick back when my mission was to get resident representation on our Board during the attempt at Chapter 11 reorganization. Although I suspect ACTS was already prompted by the lenders to look at Carlton Cove (*soon to be renamed*) my contact with Dick was possibly a catalyst to get the ball rolling with them.

The subsequent 'dismissal' of ACTS by the lending community last summer turned out to be a blessing because the 363 process released us from an owner (CCI) that could not resolve the many issues. As the new owner, ACTS has the freedom, and resources, to turn this into a community that meets ACTS' standards -- the highest in the industry. One significant precedent in our case was the early retention of a bankruptcy attorney (*with \$3500 of our 'garage sale' money from the Residents' Fund; subsequent fees were paid from the same source as all the other attorneys*) and the formation of a Court-appointed Official Residents' Committee (ORC - which I chaired) awarding us equal standing in the Court as the lenders and debtor. Our ultimate role was to influence the decisions that cleared the way for ACTS to make the "Best" bid; requiring extensive 'due diligence' on our part evaluating all the other potential bidders. We also had a 'pro-bono' financial consultant who, along with the ORC, executed Non-Disclosure Agreements regarding all the negotiations. The Bid Procedures required consultation with the ORC at every step in the process.

Our adventure since late 2002 has been arduous and likely worthy of a doctoral dissertation and case study of what went wrong from the very beginning. I'm constantly reminded of the conduct of 'Big Money' in Ann Rynd's novel "*Atlas Shrugged*" when we review the lenders' actions, and early inaction, in our story.

All that is now history. The ultimate purpose of this note is to express all the residents' appreciation for NaCCRA's actions in pointing us in the right direction.

Sincerely,
Andy

Charles D. Paulk, President
National Continuing Care Residents Association
1001 Carpenters Way, C117
Lakeland, FL 33809

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NaCCRA Membership Application

Date _____

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

Address: _____

Telephone _____ E-mail _____

Name of Community Resident's Association _____

Annual Dues Per State Association **\$400.00**
Annual Dues Per Community Association **\$150.00**
LIFETIME MEMBERSHIP **\$ 150.00**
ANNUAL DUES PER (EACH) INDIVIDUAL **\$ 15.00**
Total Enclosed.....\$ _____

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